CROSSROADS WIC PROJECT

OPERATIONS USER MANUAL

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TABLE OF CONTENTS

1- OVERVIEW 1-1

2- STATE FAMILY WORKFLOW DASHBOARD 2-1

State Family Workflow Dashboard 2-1

Task A. Viewing State Family Workflow Activity 2-2

Task B. Viewing Local Agencies Workflow Activity 2-3

Task C. Viewing Clinic Workflow Activity 2-4

3- SEARCH DUAL PARTICIPATION 3-1

Search Dual Participation 3-1

Task A. Enabling Duplicate Individual Linking 3-2

Task B. Searching for Dual Participation 3-4

Task C. Resolving Potential Duplicates 3-8

4- MAINTAIN CUSTOMER SERVICE ISSUES 4-1

Maintain Customer Service Issues 4-1

Task A. Adding a Customer Service Issue 4-2

Task B. Searching for Customer Service Issues 4-4

Task C. Editing a Customer Service Issue 4-9

Task D. Assigning a Customer Service Issue 4-11

5- NOTIFICATIONS 5-1

Notifications 5-1

Task A. Searching for Notifications 5-2

Task B. Previewing and Printing a Single Notification 5-3

Task C. Printing Multiple Notifications 5-5

Task D. E-mail/Text Multiple Notifications 5-7

Task E. Completing Multiple Notifications by Phone 5-9

Task F. Deleting Notifications from the Queue 5-10

6- MAINTAIN OUTREACH ORGANIZATIONS 6-1

Maintain Outreach Organizations 6-1

Task A. Adding a New Outreach Organization 6-2

Task B. Searching and Editing an Outreach Organization 6-7

7- MAINTAIN OUTREACH CAMPAIGNS 7-1

Maintain Outreach Campaigns 7-1

Task A. Adding a New Outreach Campaign 7-2

Task B. Searching and Editing an Outreach Campaign 7-4

8- MAINTAIN CASE FILES 8-1
Maintain Case Files 8-1
Task A. Searching for an Existing Case File 8-2
Task B. Creating a New Case File 8-3
Task C. Recording Investigations 8-7
Task D. Recording Sanctions 8-9
Task E. Recording Appeals 8-12
Task F. Recording Hearings 8-16
Task G. Editing an Existing Case File 8-19
Task H. Closing a Case File 8-21
9- INVENTORY 9-1
Search Product Inventory 9-1
Task A. Adding Inventory 9-2
Task B. Searching for Existing Inventory 9-8
Task C. Ordering Inventory 9-10
Task D. Transferring Inventory 9-16
Task E. Issuing Inventory 9-19
Task F. Reserving Inventory 9-23
Task G. Disposing of Inventory 9-27
Task H. Returning Inventory 9-30
Search Orders and Transfer Requests 9-33
Task A. Search and Locate the Transfer Request 9-34
Task B. Approve or Disapprove the Transfer Request 9-36
MCH Product Inventory 9-38
Task A. View the MCH Product Inventory 9-39
Maintain Products 9-40
Task A. Searching for Products 9-41
Task B. Adding Products 9-43
Task C. Editing Products 9-46
Maintain Types 9-49
Task A. Adding an Inventory Type 9-50
Task B. Editing an Inventory Type 9-53
Maintain Manufacturers 9-56
Task A. Adding a New Manufacturer 9-57
Task B. Editing a Manufacturer 9-59
Issued Formula Items 9-61
Task A. Search for Formula Items Issued to Participants 9-62
10- MONITORING AND ANALYSIS 10-1

Local Agency Monitoring 10-1
Task A. Scheduling Agencies and Clinics for On-Site Monitoring 10-2
Task B. Recording Agency and Clinic Monitoring Results 10-7
Local Agency and Clinic Self-Monitoring 10-11
Task A. Recording Agency or Clinic Self-Monitoring Results 10-12
Local Agency and Clinic Analysis 10-15
Task A. Selecting the Parameters for the Report 10-16
Task B. Selecting and Displaying the Report for Agencies and Clinics 10-17
11- MANAGE STAFF TRAINING 11-1
Manage Staff Training 11-1
Task A. Navigating to the Master Calendar and Scheduling an Event 11-2
Task B. Defining the Training Event 11-5
Task C. Managing Staff Training 11-6
12- DISCONNECT OPERATIONS 12-1
Data Synchronization 12-1
Task A. Initial Configuration for a Disconnected Clinic 12-2
Task B. Checking Out a WIC Clinic 12-4
Task C. Checking In a WIC Clinic 12-10
13- CREATE SURVEY DISTRIBUTION LIST 13-1
Create Survey Distribution List 13-1
Task A. Completing the Create Survey Distribution List Input Form 13-2
Task B. Exporting the Distribution List 13-4
14- EBT 14-1
Search Transactions by Clinic 14-1
Task A. Searching for EBT Transactions by Clinic 14-2
Search Transactions by Vendor 14-4
Task A. Searching for EBT Transactions by Vendor 14-5
Request ACH Payment 14-8
Task A. Requesting an ACH Payment 14-9
Override Payment 14-11
Task A. Overriding a Payment 14-12
Search Benefit Reconciliation Exception 14-14
Task A. Searching for and Modifying a Benefit Reconciliation Exception 14-15
Redemption Discrepancies 14-17
Task A. Viewing EBT Redemption Discrepancies 14-18
Food Override Tool 14-19

Task A. Using the EBT Food Override Tool 14-20

15- SETUP 15-1

Maintain Appointment Types 15-1

Task A. Adding a New Appointment Type 15-2

Task B. Adding New Nutrition Education Subtype 15-5

Maintain Nutrition Education Topics 15-8

Task A. Adding a Nutrition Education Topic 15-9

Task B. Searching and Editing a Nutrition Education Topic 15-11

Task C. Maintaining Online Providers 15-12

Maintain Training Types 15-13

Task A. Maintaining Training Types 15-14

Task B. Adding and Editing Training Types 15-18

Maintain Assets 15-20

Task A. Adding Assets 15-21

Task B. Editing Assets 15-23

Task C. Disable Assets 15-25

Task D. Enable Previously Disabled Assets 15-26

Maintain Referral Organizations 15-27

Task A. Create New Referral Organizations 15-28

Task B. Modify Existing Organizations 15-31

Maintain Local Agencies 15-32

Task A. Creating a Local Agency 15-33

Task B. Searching and Editing an Existing Local Agency 15-38

Maintain Clinics 15-40

Task A. Creating a Clinic 15-41

Task B. Searching and Editing a Clinic 15-48

Task C. Adding User to Location 15-51

Task D. Managing Staff Training 15-53

Maintain Assessment Questions 15-54

Task A. Searching for Assessment Questions 15-55

Task B. Modifying an Assessment Question 15-56

Maintain Breast Pump Issuance Questions 15-60

Task A. Searching for Assessment Questions 15-61

Task B. Modifying an Assessment Question 15-63

Maintain Communication Types 15-66

Task A. Create a New Communication Type 15-67

Task B. Modify an existing Communication Type 15-70

Maintain Functional Areas 15-72

Task A. Adding a Monitoring Task for Each Functional Area 15-73
Task B. Creating New Functional Areas 15-74
Maintain Risk Codes 15-75
Task A. Select the Risk Code to Maintain 15-76
Task B. Enter New Values for the Risk Code 15-77
16- MAINTAIN CLINIC DASHBOARD ROOMS 16-1
Maintain Clinic Dashboard Rooms 16-1
Task A. Maintaining Clinic Rooms 16-2
17- CORRELATE CLINIC ROOMS TO NAVIGATION 17-1
Correlate Clinic Rooms to Navigation 17-1
Task A. Correlating Clinic Rooms to Navigation 17-2
18- CORRELATE APPOINTMENT TYPES TO NAVIGATION 18-1
Correlate Appointment Types to Navigation 18-1
Task A. Correlating Appointment Types to Navigation 18-2
19- WIC PARTICIPANT AND PROGRAM CHARACTERISTICS STUDY 19-1
WIC Participant and Program Characteristics Study 19-1
Task A. Filling out the Worksheet for Transmitting April Data Files 19-2
Task B. Creating and Sending the Initial MDS and SDS File 19-4
Task C. Creating and Sending the Reviewed MDS and SDS File 19-6
Task D. Creating and Sending the Final MDS and SDS File 19-8

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1- OVERVIEW

This manual will aid WIC staff in learning about the function and use of the Operations module of the Crossroads WIC System. The Operations module is a comprehensive solution to help WIC staff manage a variety of tasks such as managing inventory levels, scheduling and recording local agency and clinic monitoring, and setting up and maintaining operational areas for use in the module. Major functions of this module include the following:

- **Maintaining Inventory** – Used to search for, order, issue, dispose of, and return product inventory.
- **Recording and Analyzing Monitoring Visits** – Used to schedule and record local agency and clinic monitoring visits (including self-monitoring), and generate analysis reports.
- **Setting Up Clinic Operations** – Used to create and maintain local agencies, clinics, appointment types, nutrition education topics, training topics, assessment questions, and functional areas for use in the Clinic module.
- **Searching Dual Participation** – Used to search for and resolve possible cases of dual participation in the Crossroads WIC system.

Manual Content

This manual includes the following components organized in the order indicated:

- **Table of Contents (TOC)** – Lists each documented training scenario included in this manual. The TOC is organized to complement the delivery of instructor-led, classroom training. Similar scenarios are grouped together by major system functions. Use the TOC to look up training scenarios first by function and then by scenario title.
- **Training Manual Overview** – Outlines the content of this manual and explains how this manual can be used. It includes information about the general structure of this manual and tips to help you get the most out of it.
- **Training Scenarios** – Covers situations that one might encounter in a typical day. Each scenario walks you through an entire process. Scenarios connect the individual tasks necessary to complete a process. The scenarios were written and organized to facilitate an instructor-led training session, but the scenarios can be used as reference guides after your training is complete.

Conventions and Features

This manual follows certain conventions that make it easy for you to use the materials presented and includes the following features that help you identify similar information from one topic to another:

- Training scenarios are grouped together by major system functions, so that you can locate the desired scenario more easily.
- Each training scenario begins with an Overview section that includes an explanation of what is covered within the scenario, so you'll know from the start what you'll be learning.
- Training scenarios are documented using Tasks and Steps. A Task is a major activity in a larger process and indicates a substantial portion of the overall process whereas a Step is one of several user actions within a Task.
- The manual provides Tasks and Steps for differing levels of detail. You can follow the list of Tasks (less detail) or you can go deeper and follow each Step of the process, click by click and action by action (more detail).

- Buttons you'll need to click and data you'll need to enter are accented in bold to help them stand out on the page, so that you can identify these items more easily.
- Pictures of application screens are included within each training scenario to help familiarize you with the screens. Data displayed in the pictures is intended for illustrative purposes only and does not represent live data. During classroom training, use the data supplied by the instructor. Outside of classroom training, enter the appropriate data as necessary to complete the task at hand.
- Callout boxes help you find specific types of information quickly. The callout boxes are displayed and defined below.

Notes

The notepad-and-pencil icon displays to the left of paragraphs that provide additional, and usually more detailed, information about the application. Sometimes the notes give you additional information about the screen you're working with, and sometimes the notes inform you where to find additional information elsewhere. Either way, it is well worth your time to watch for these helpful icons.

Using This Manual

This manual can be used as a training manual during instructor-led, classroom training or as a reference guide once training is concluded. Use the table of contents (TOC) to locate a training scenario. Once you've located a specific training scenario, review the Overview section (at a minimum) to find out important details surrounding the scenario such as the starting point, type of data needed, and a summary of the Task(s) to be completed in the overall process. You can follow the associated Steps for more detail as needed.

Module Setup for State-specific Functionality

The Crossroads WIC System requires some initial setup before it can be used. Setup for the User Manual includes the following:

Features – Certain features of the User Manual are set up using the System Administration module. These features must be set up before the system is used to ensure the system functions as expected. Please refer to the Manage System Settings section of the System Administration Module DFDD for additional information about state-defined features.

The following is a list of applicable system settings:

- **% of Local Agencies to Monitor** – Percentage of the State's Local Agencies that require on-site monitoring on an annual basis (default to 50% – as this is the minimum established in the regulations).
- **Date for LA Monitoring to Set the Next FFY Schedule** – Month and day of the year to establish the on-site monitoring schedule for the next federal fiscal year based on the % of Local Agencies to Monitor and the Local Agencies Monitored the previous year (default to July 1).
- **Participant and Program Characteristics** – Interface (FTP) specifications for the WIC Participant and Program Characteristics Study data destination.

2- STATE FAMILY WORKFLOW DASHBOARD

State Family Workflow Dashboard

The **State Family Workflow Dashboard** provides state Crossroads users a real-time view of the activities of all agencies in the state.

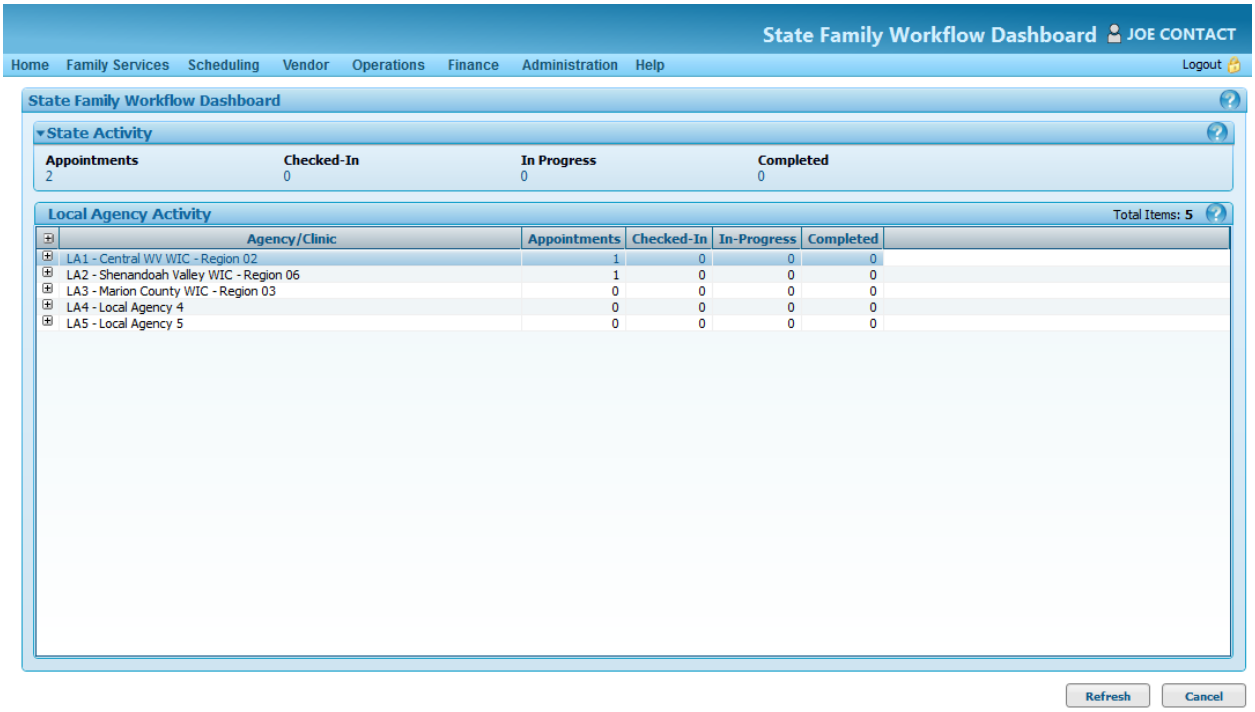
This process includes the following tasks:

Task A. Viewing State Family Workflow Activity 2-2
Task B. Viewing Local Agencies Workflow Activity 2-3
Task C. Viewing Clinic Workflow Activity 2-4

Task A. Viewing State Family Workflow Activity

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → State Family Workflow Dashboard**. The **State Family Workflow Dashboard** screen displays.



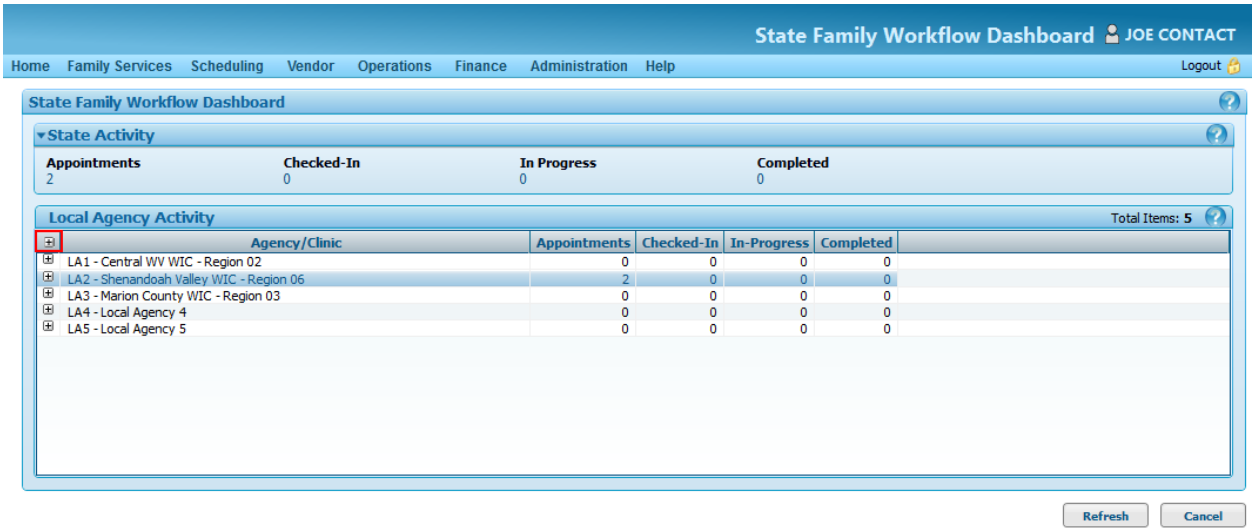
2. If you would like to update the data to get current totals, click **Refresh**.

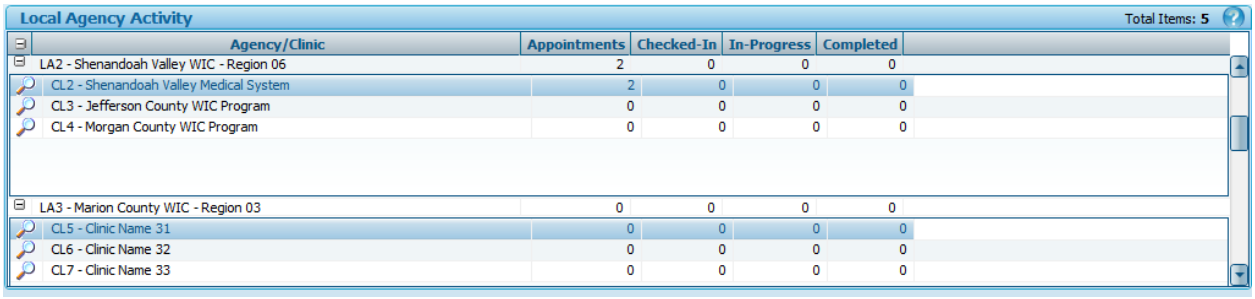
Under State Activity, the total family appointments for today from all agencies display under Appointments. Total family appointments checked-in at the time of viewing, display under Checked-In. The total WIC families who are being served currently display under In-Progress. The total completed appointments display under Completed.

Task B. Viewing Local Agencies Workflow Activity

Complete the following steps to perform this task:

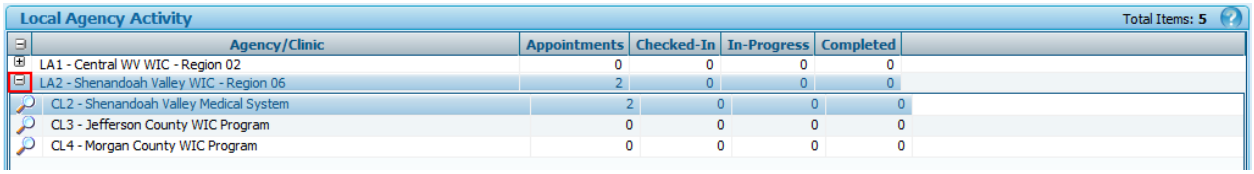
1. Click the plus sign (⊞) to display all clinics for each agency in the state. All clinics are displayed for each agency in the state.




Local Agency Activity
Total Items: 5
Agency/Clinic
Appointments
Checked-In
In-Progress
Completed
LA2 - Shenandoah Valley WIC - Region 06 2 0 0 0
CL2 - Shenandoah Valley Medical System 2 0 0 0
CL3 - Jefferson County WIC Program 0 0 0 0
CL4 - Morgan County WIC Program 0 0 0 0
LA3 - Marion County WIC - Region 03 0 0 0 0
CL5 - Clinic Name 31 0 0 0 0
CL6 - Clinic Name 32 0 0 0 0
CL7 - Clinic Name 33 0 0 0 0

Under Local Agency Activity, the total family appointments for today from each agency display under Appointments. Total agency families checked-in at the time of viewing displays under Checked-In. The total agency WIC families who are being served currently display under In-Progress. The total agency completed appointments display under Completed.

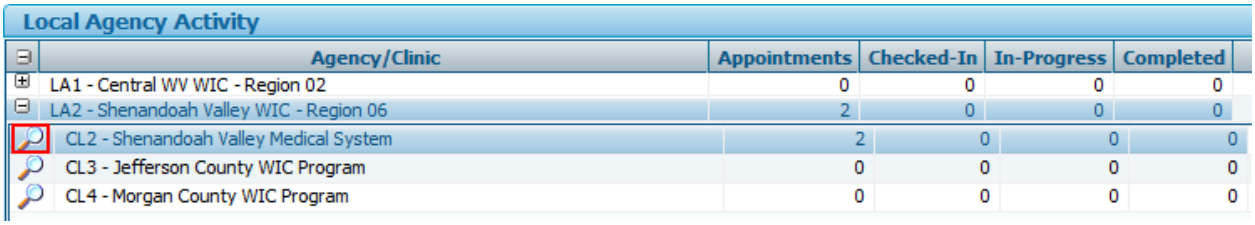
2. To display clinics in a single agency, click on the plus sign (⊞) for the agency. All clinics for the agency display under the agency.

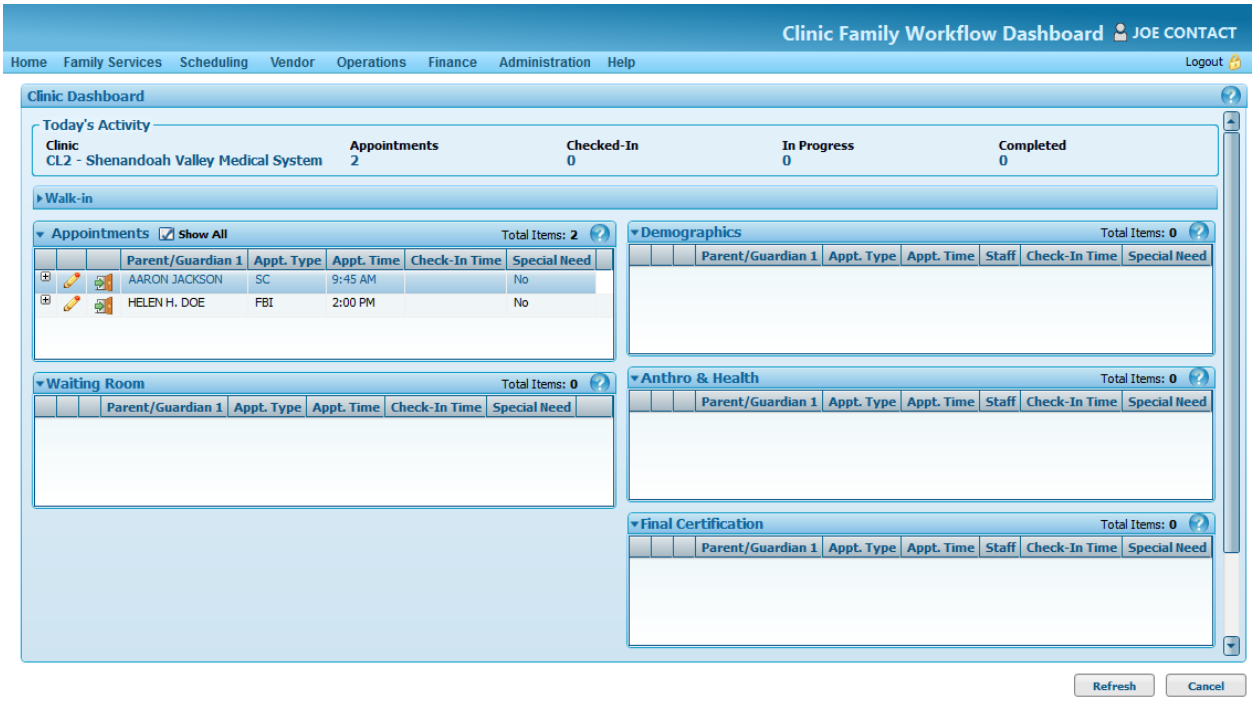

Local Agency Activity
Total Items: 5
Agency/Clinic
Appointments
Checked-In
In-Progress
Completed
LA1 - Central WV WIC - Region 02 0 0 0 0
LA2 - Shenandoah Valley WIC - Region 06 2 0 0 0
CL2 - Shenandoah Valley Medical System 2 0 0 0
CL3 - Jefferson County WIC Program 0 0 0 0
CL4 - Morgan County WIC Program 0 0 0 0

Task C. Viewing Clinic Workflow Activity

Complete the following steps to perform this task:

1. To display the **Clinic Family Workflow Dashboard**, click the **View** button ( ) on the clinic row. The **Clinic Family Workflow Dashboard** displays.


Local Agency Activity
Agency/Clinic
Appointments
Checked-In
In-Progress
Completed
LA1 - Central WV WIC - Region 02 0 0 0 0
LA2 - Shenandoah Valley WIC - Region 06 2 0 0 0
CL2 - Shenandoah Valley Medical System 2 0 0 0
CL3 - Jefferson County WIC Program 0 0 0 0
CL4 - Morgan County WIC Program 0 0 0 0



The Clinic Dashboard shows summary activity under Today's Activity. Appointments can be viewed in their current stages of progress through clinic configured service rooms. Walk-in Appointments can also be viewed. For more details see the Clinic Family Workflow Dashboard scenario.

Congratulations!

You have successfully completed the **State Family Workflow Dashboard** process.

3- SEARCH DUAL PARTICIPATION

Search Dual Participation

The **Search Dual Participation** screen provides tools for searching for possible cases of dual participation which may lead to investigations to determine if dual enrollment and/or dual participation has occurred.

The tasks in this scenario show actions performed with the duplicate individual linking feature enabled on the Manage System Settings screen in the Administration module. The first task in this scenario will show you how to enable this feature.

This process includes the following tasks:

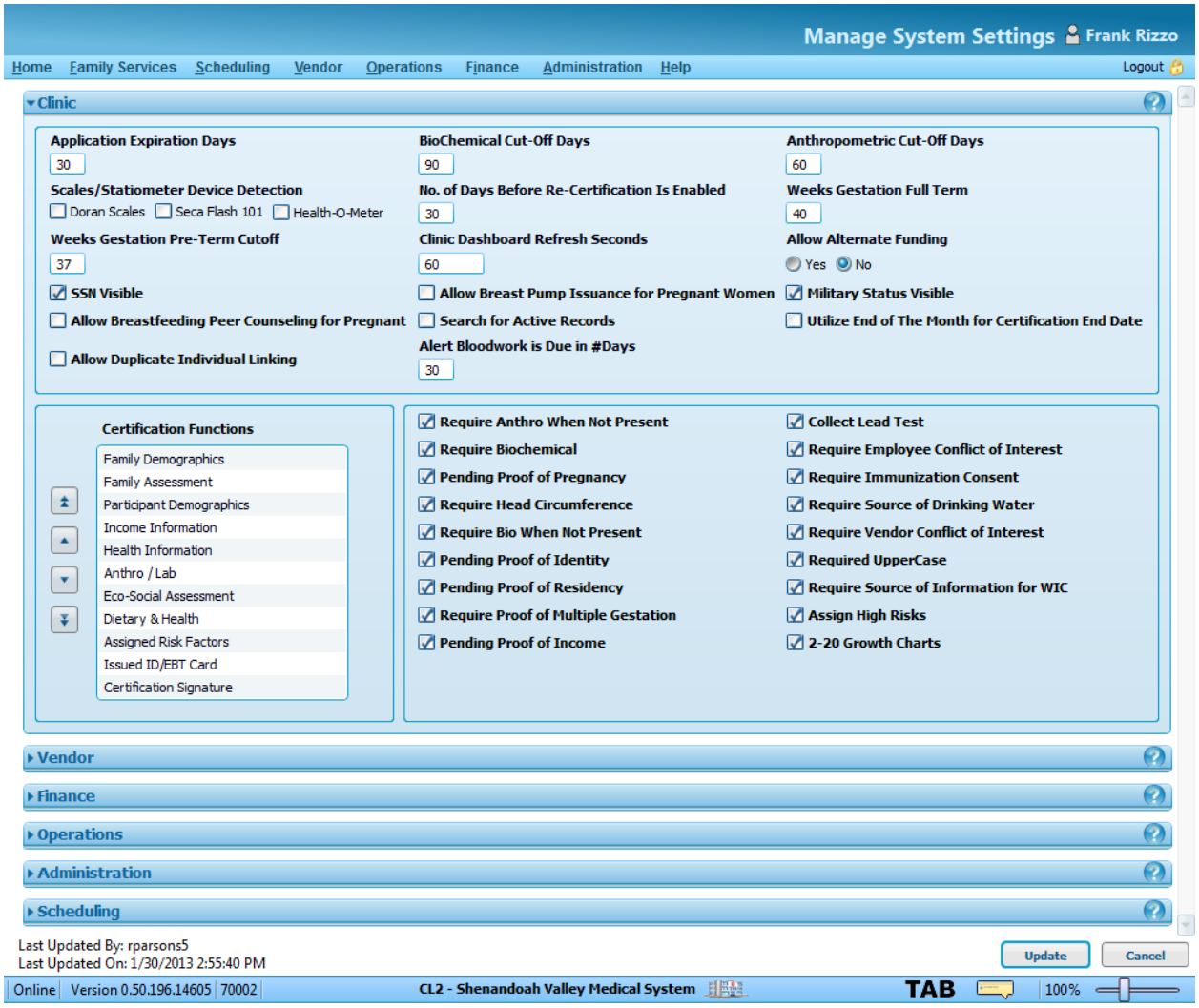
Task A. Enabling Duplicate Individual Linking 3-2
Task B. Searching for Dual Participation 3-4
Task C. Resolving Potential Duplicates 3-8

Task A. Enabling Duplicate Individual Linking

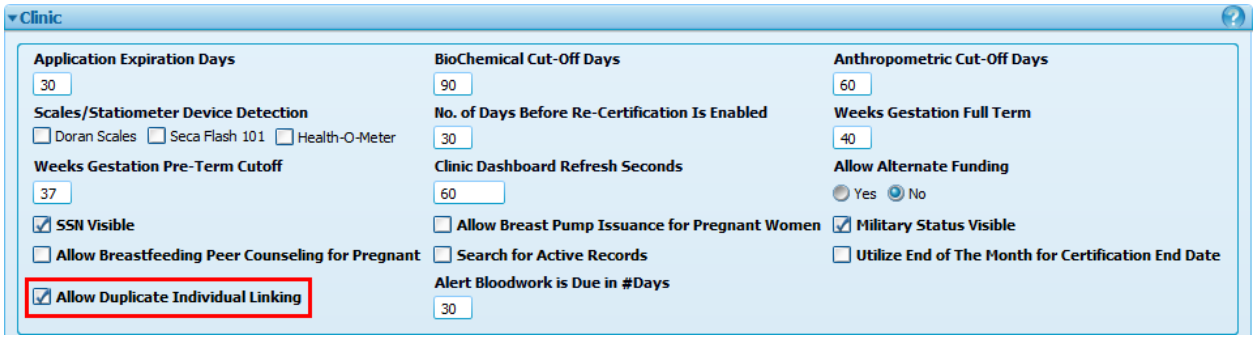
The tasks in this scenario show actions performed with the duplicate individual linking feature enabled on the **Manage System Settings** screen in the Administration module. This task shows you how to enable this feature.

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Administration → Configuration → Manage System Settings**. The **Manage System Settings** screen displays.



2. Under **Clinic**, select the **Allow Duplicate Individual Linking** check box.

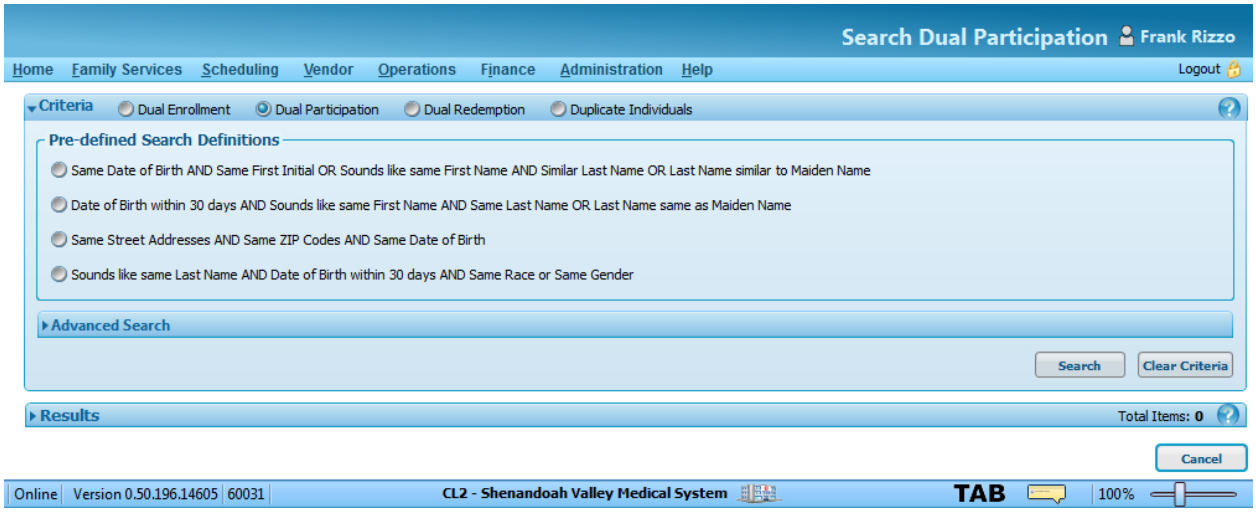


3. Click **Update**. A status message displays indicating success.

Task B. Searching for Dual Participation

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → Search Dual Participation**. The **Search Dual Participation** screen displays.

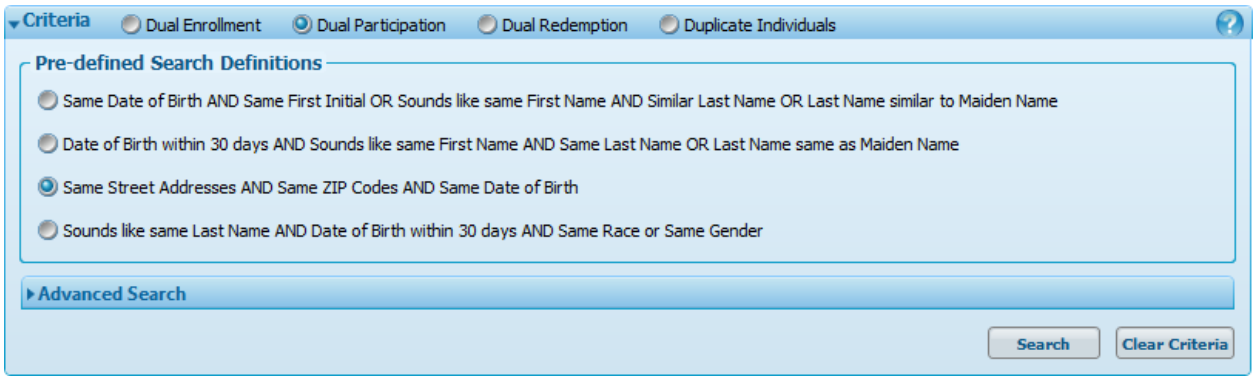


2. There are four types of dual participation on which you can search. In the **Criteria** section, select one of the following four radio buttons to specify the type of dual participation on which to search:
   - Select the **Dual Enrollment** radio button to search for potentially duplicate individuals currently that are enrolled (certified).
   - Select the **Dual Participation** radio button to search for:
     - Potentially duplicate individuals that are currently enrolled (certified),
     - Have been issued benefits.
   - Select the **Dual Redemption** radio button to search for:
     - Potentially duplicate individuals that are currently enrolled (certified),
     - Have been issued benefits, and
     - The benefits issued have been redeemed at a vendor store.
   - Select the **Duplicate Individuals** radio button to search for all potentially duplicate individuals (applicants, enrollees, participants, and terminated participants).

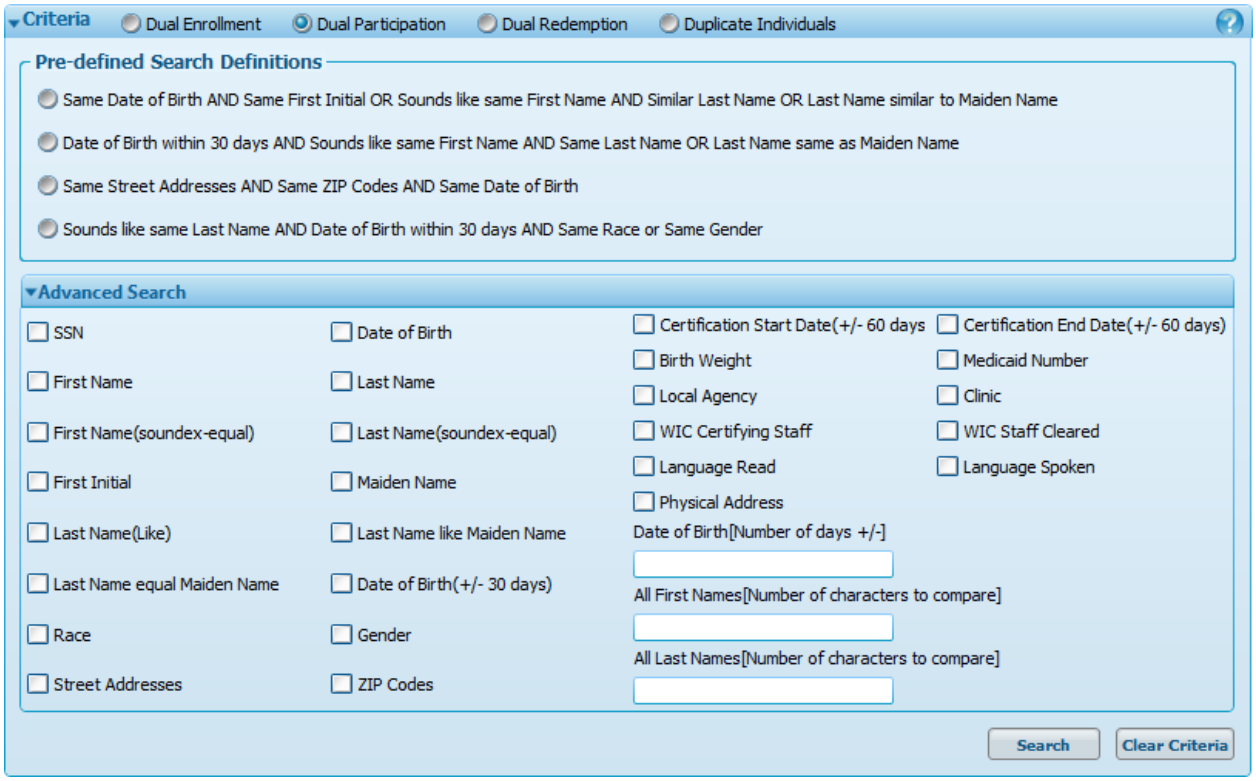
The Dual Participation radio button is selected as the default.

The Duplicate Individuals radio button is only available on the Search Dual Participation screen when the duplicate individual linking feature is enabled on the Manage System Settings screen in the Administration module. Refer to Task A. Enabling Duplicate Individual Linking on page 3-2 for details.

3. There are two different methods you can use to search for dual participation records. The first and quickest search method available is using pre-defined search criteria. In the **Criteria** section, select one of the radio buttons in the **Pre-defined Search Definitions** group box.


Criteria
Dual Enrollment
Dual Participation
Dual Redemption
Duplicate Individuals
Pre-defined Search Definitions
Same Date of Birth AND Same First Initial OR Sounds like same First Name AND Similar Last Name OR Last Name similar to Maiden Name
Date of Birth within 30 days AND Sounds like same First Name AND Same Last Name OR Last Name same as Maiden Name
Same Street Addresses AND Same ZIP Codes AND Same Date of Birth
Sounds like same Last Name AND Date of Birth within 30 days AND Same Race or Same Gender
Advanced Search
Search
Clear Criteria

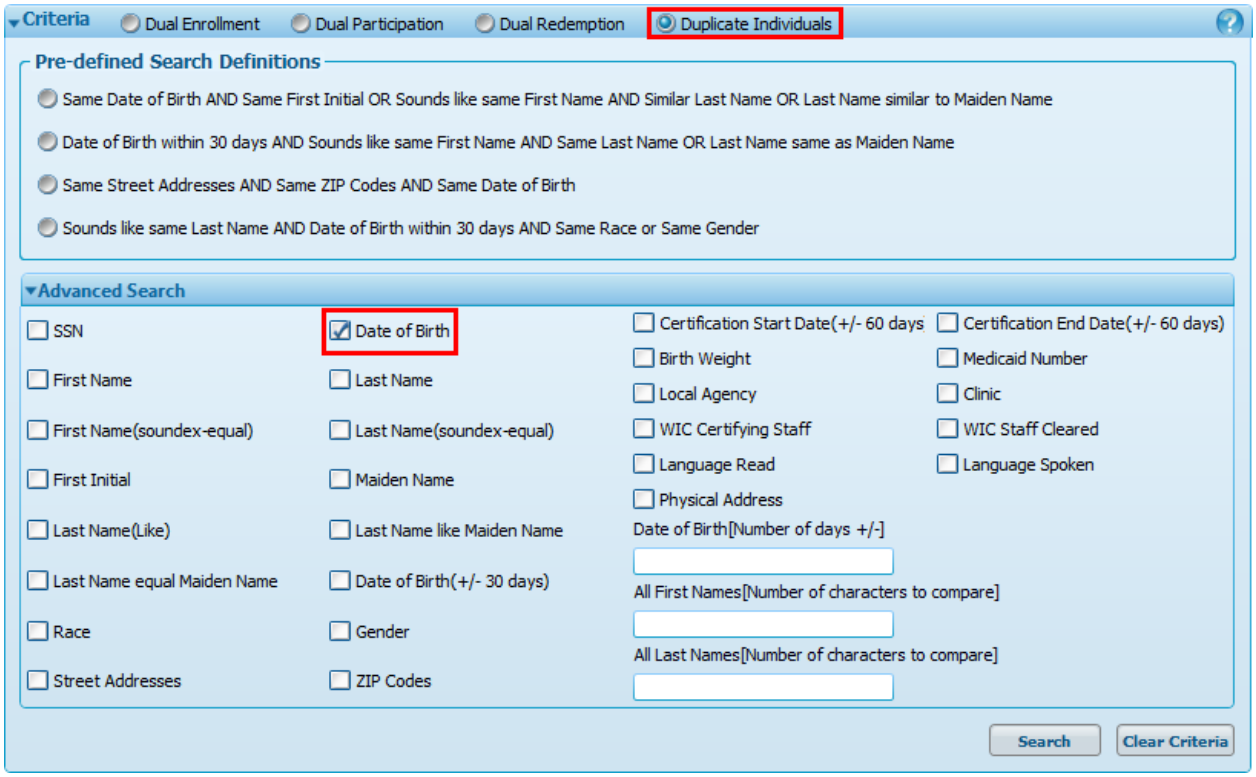
If the pre-defined combinations of search criteria are not appropriate for your dual participation search needs, the second method available is using advanced search criteria. To expand the **Advanced Search** section, click the expand/collapse arrow.


Criteria
Dual Enrollment
Dual Participation
Dual Redemption
Duplicate Individuals
Pre-defined Search Definitions
Same Date of Birth AND Same First Initial OR Sounds like same First Name AND Similar Last Name OR Last Name similar to Maiden Name
Date of Birth within 30 days AND Sounds like same First Name AND Same Last Name OR Last Name same as Maiden Name
Same Street Addresses AND Same ZIP Codes AND Same Date of Birth
Sounds like same Last Name AND Date of Birth within 30 days AND Same Race or Same Gender
Advanced Search
SSN
Date of Birth
First Name
Last Name
First Name(soundex-equal)
Last Name(soundex-equal)
First Initial
Maiden Name
Last Name(Like)
Last Name like Maiden Name
Last Name equal Maiden Name
Date of Birth(+/- 30 days)
Race
Gender
Street Addresses
ZIP Codes
Certification Start Date(+/- 60 days
Certification End Date(+/- 60 days)
Birth Weight
Medicaid Number
Local Agency
Clinic
WIC Certifying Staff
WIC Staff Cleared
Language Read
Language Spoken
Physical Address
Date of Birth[Number of days +/-]
All First Names[Number of characters to compare]
All Last Names[Number of characters to compare]
Search
Clear Criteria

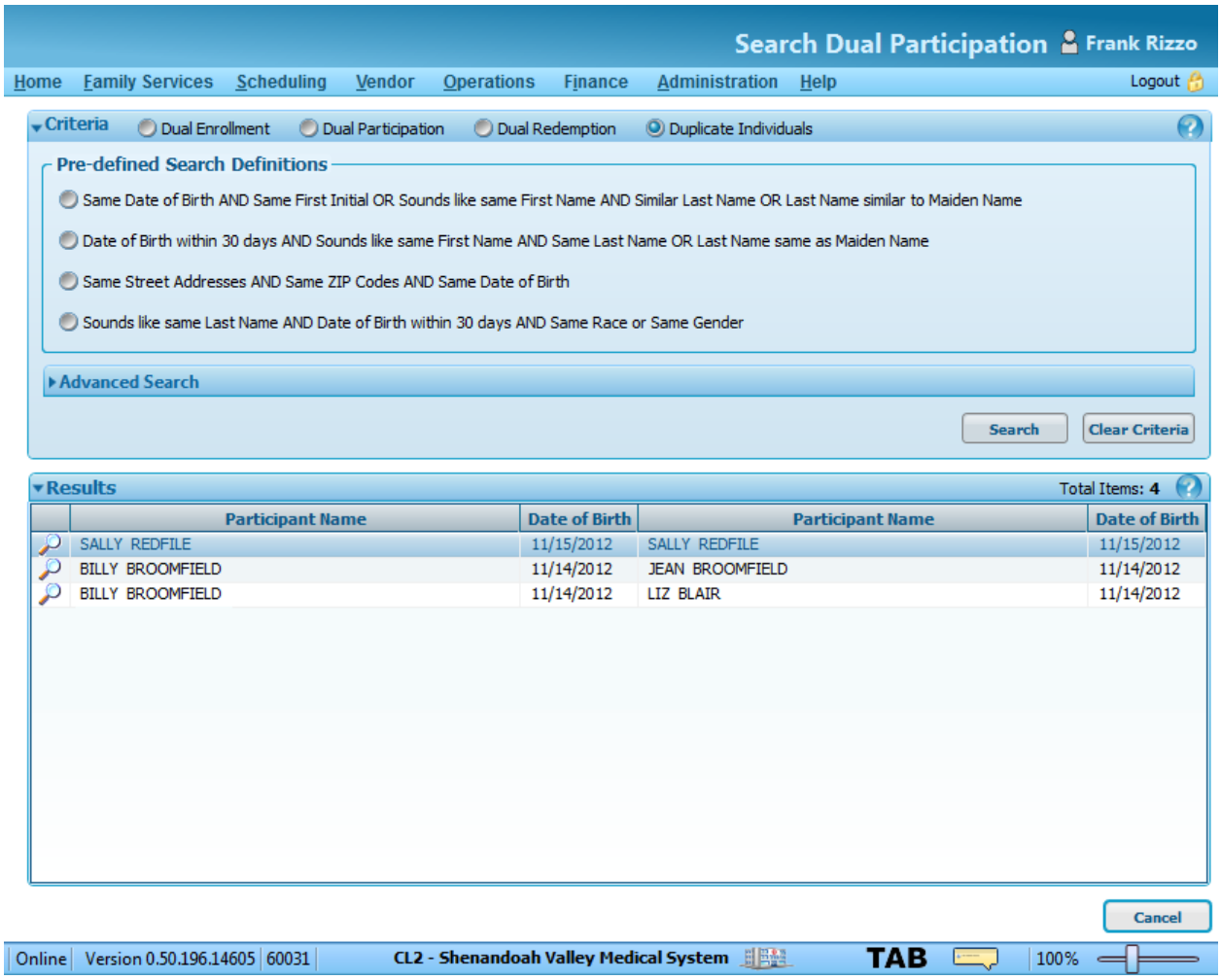
Advanced search can be used to make searches more or less specific than pre-defined search definitions.

Pre-defined search definitions and advanced search cannot be used simultaneously. If an option is selected in the Pre-defined Search Definitions group box when a selection is made in the Advanced Search group box, the selection in the Pre-defined Search Definitions group box is cleared. If one or more options are specified in the Advanced Search group box and a selection is made in the Pre-defined Search Definitions group box, the options specified in the Advanced Search group box are cleared.

For the purposes of this task, an advanced search is performed on duplicate individuals by date of birth.


Criteria
Dual Enrollment
Dual Participation
Dual Redemption
Duplicate Individuals
Pre-defined Search Definitions
Same Date of Birth AND Same First Initial OR Sounds like same First Name AND Similar Last Name OR Last Name similar to Maiden Name
Date of Birth within 30 days AND Sounds like same First Name AND Same Last Name OR Last Name same as Maiden Name
Same Street Addresses AND Same ZIP Codes AND Same Date of Birth
Sounds like same Last Name AND Date of Birth within 30 days AND Same Race or Same Gender
Advanced Search
SSN
Date of Birth
Certification Start Date(+/- 60 days
Certification End Date(+/- 60 days)
First Name
Last Name
Birth Weight
Medicaid Number
First Name(soundex-equal)
Last Name(soundex-equal)
Local Agency
Clinic
First Initial
Maiden Name
WIC Certifying Staff
WIC Staff Cleared
Language Read
Language Spoken
Physical Address
Last Name(Like)
Last Name like Maiden Name
Date of Birth[Number of days +/-]
Last Name equal Maiden Name
Date of Birth(+/- 30 days)
All First Names[Number of characters to compare]
Race
Gender
All Last Names[Number of characters to compare]
Street Addresses
ZIP Codes
Search
Clear Criteria

4. Click **Search**. The **Search Dual Participation** screen refreshes and the **Results** grid updates and displays results based on the specified search criteria. If the **Advanced Search** group box was expanded, it is collapsed when the screen refreshes.



The Results grid displays the Participant Name and Date of Birth of each participant that matches the specified search criteria.

Four columns display in the grid. The Participant Name and Date of Birth columns on the left side of the grid display the name and date of birth of the first participant found and flagged as a potential duplicate. The Participant Name and Date of Birth on the right side of the grid display the name and date of birth of the second participant found and flagged as a potential duplicate.

Click a column header to sort the items in the grid. Click and hold, then drag and drop columns of information to reorganize the order of the columns in the grid.

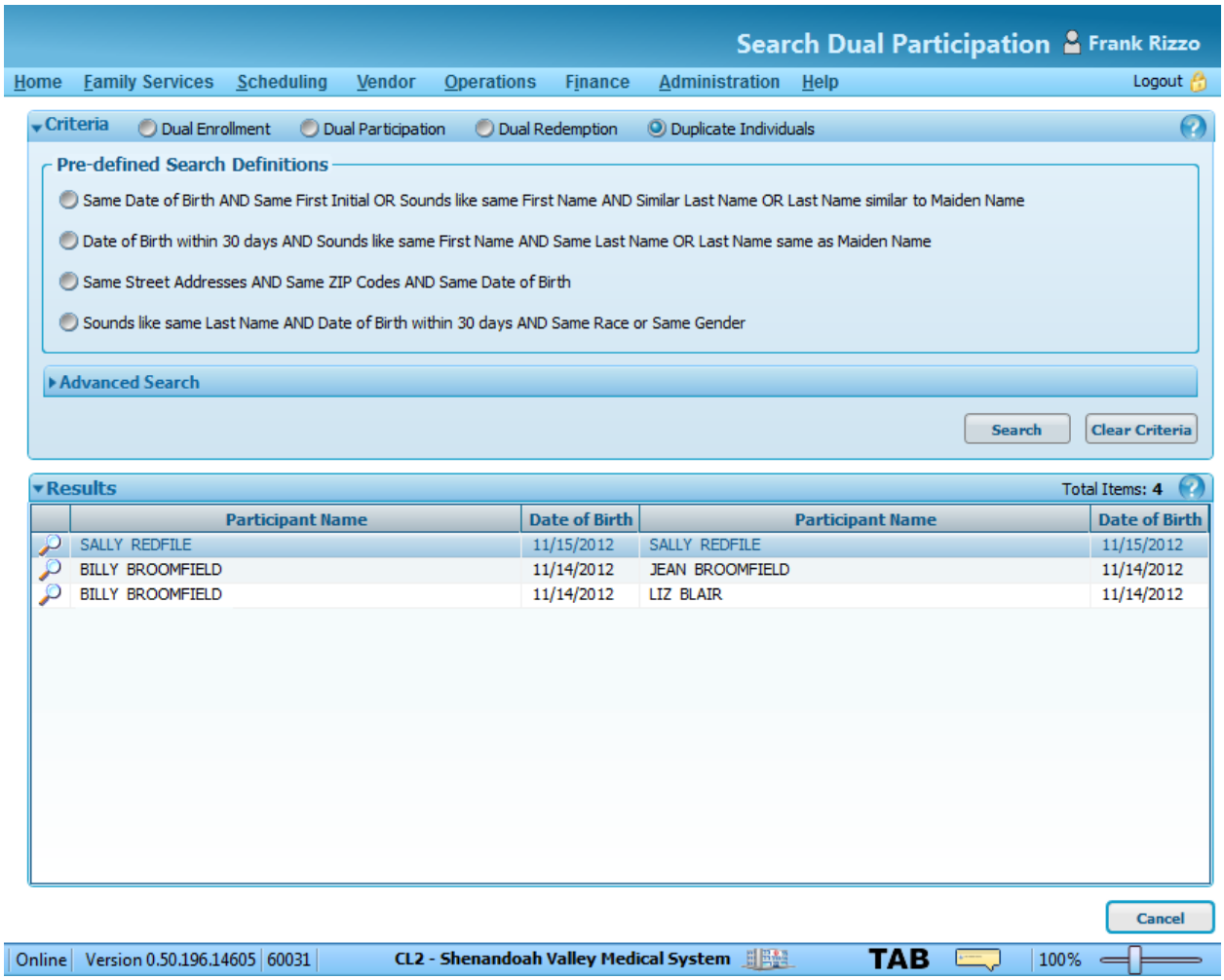
The results that are returned from a dual participation search need to be resolved. Click the View button (🔎) to resolve the possible dual participation case. Refer to Task C. Resolving Potential on page 3-8 for details.

Task C. Resolving Potential Duplicates

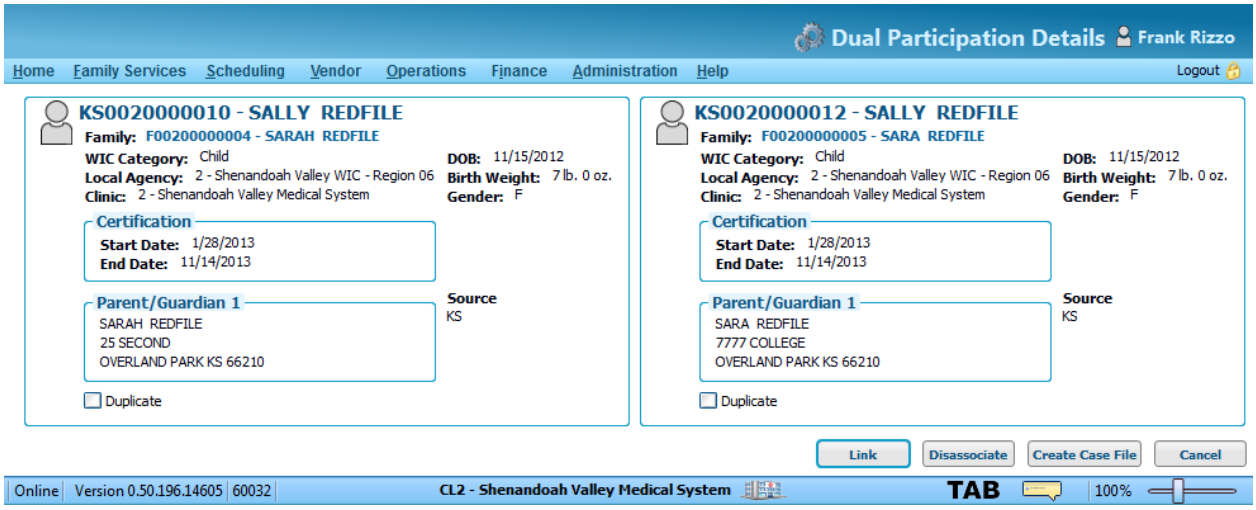
This task continues where the previous task in this scenario ended. Refer to Task B. Searching for Dual Participation on page 3-4 for details.

Complete the following steps to perform this task:

1. Search for potential duplicates on the **Search Dual Participation** screen.

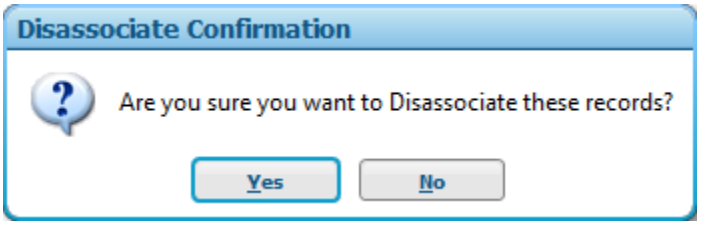


2. In the **Results** grid, click the **View** button ( ) to resolve the possible dual participation case. The **Dual Participation Details** screen displays.



3. Examine the details displayed on the **Dual Participation Details** screen and determine if the two individuals are duplicates.

   For the purposes of this task, we assume the two individuals displayed are duplicates. However, if the two individuals displayed are not duplicates, you can click **Disassociate** to indicate that they are not duplicates. The **Disassociate Confirmation** screen displays.

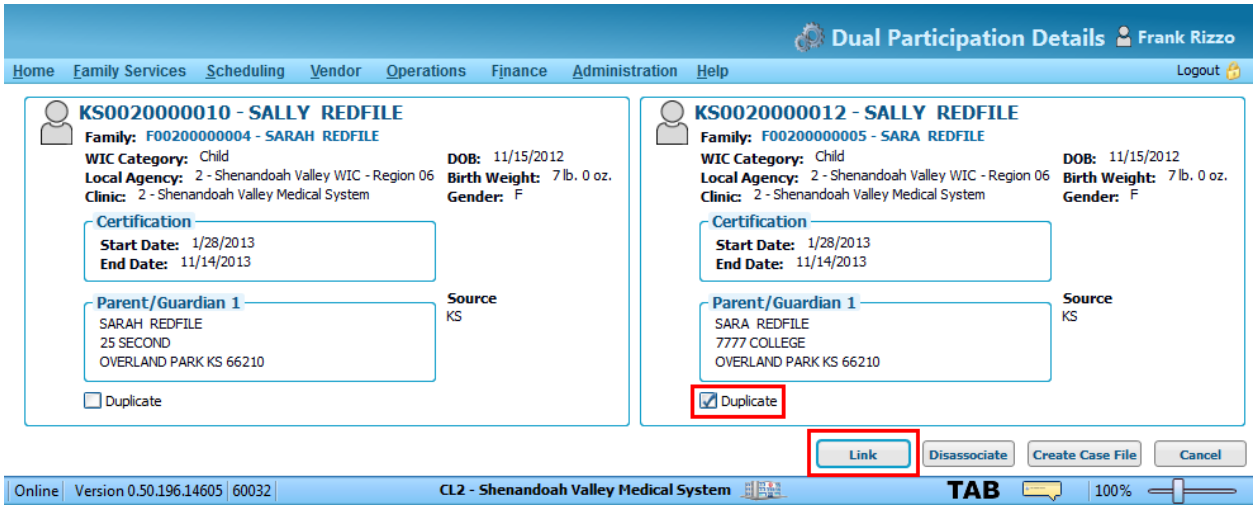


   Click **Yes** to confirm the disassociation. When clicked, the potential duplicate flag is removed from both records and the **Search Dual Participation** screen refreshes and displays a status message confirming success. The selected records are removed from the **Results** grid and they will no longer display as search results when future searches are performed on the **Search Dual Participation** screen.

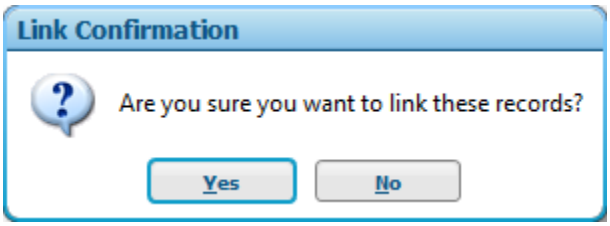
4. If a more thorough investigation is required which warrants opening a case file, click **Create Case File**. The **Maintain Case Files** screen displays.

The Maintain Case Files screen is used to create case files. Refer to Task B. Creating a New Case File on page 8-3 for details.

5. If the two individuals displayed are duplicates, select the **Duplicate** check box for the individual that is the duplicate.



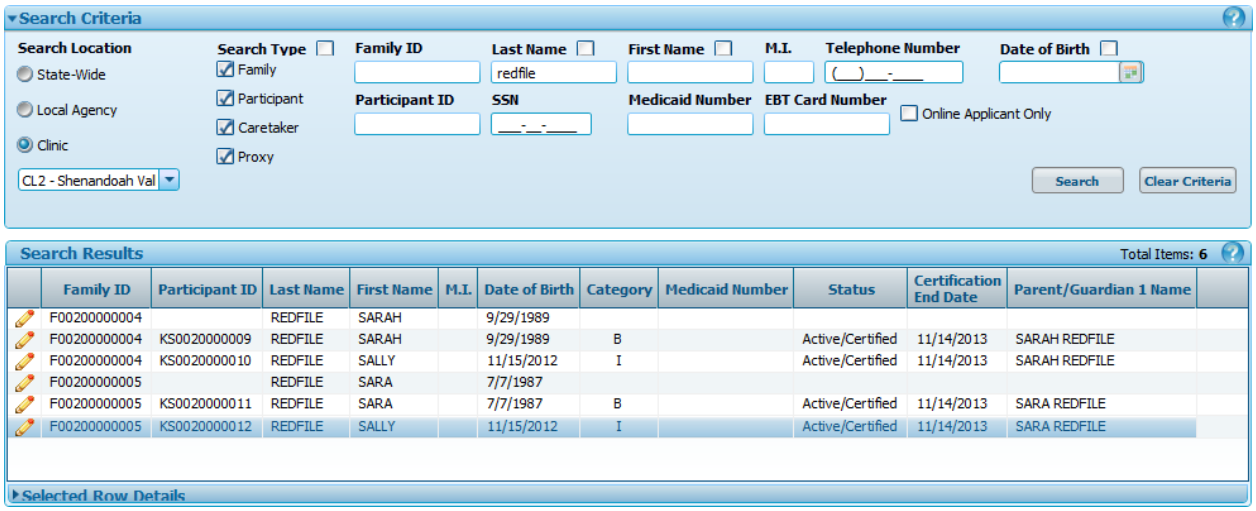
6. Click **Link** to link the two records. The **Link Confirmation** screen displays.



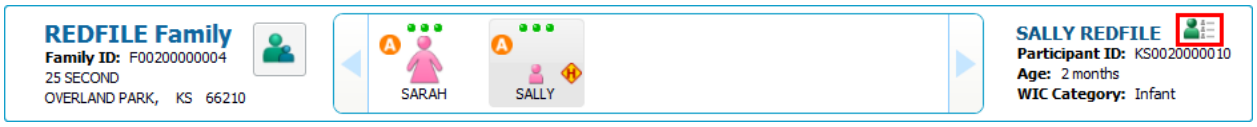
7. Click **Yes** to confirm the link. When clicked, the potential duplicate flag is removed from both records and the **Search Dual Participation** screen refreshes and displays a status message confirming success. The selected records are removed from the **Results** grid and they will no longer display as search results when future searches are performed on the **Search Dual Participation** screen.

When records are linked, changes are made to the family header in the Family Services module. The following steps will walk you through the changes.

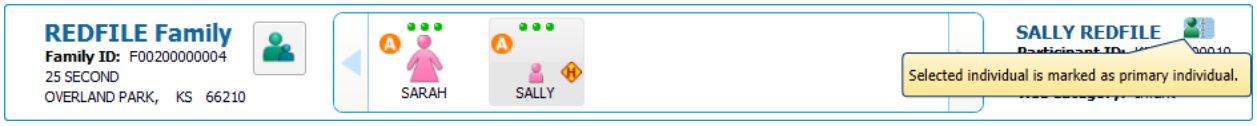
8. Go to **Family Services → Family**. The **Family Search** screen displays.
9. Search for the linked individual and open the family record.


Search Criteria
Search Location
State-Wide
Local Agency
Clinic
CL2 - Shenandoah Val
Search Type
Family
Participant
Caretaker
Proxy
Family ID
Last Name
redfile
First Name
M.I.
Telephone Number
Date of Birth
Participant ID
SSN
Medicaid Number
EBT Card Number
Online Applicant Only
Search
Clear Criteria
Search Results
Total Items: 6
Family ID | Participant ID | Last Name | First Name | M.I. | Date of Birth | Category | Medicaid Number | Status | Certification End Date | Parent/Guardian 1 Name
F00200000004 | | REDFILE | SARAH | | 9/29/1989 | | | | | |
F00200000004 | KS0020000009 | REDFILE | SARAH | | 9/29/1989 | B | | Active/Certified | 11/14/2013 | SARAH REDFILE
F00200000004 | KS0020000010 | REDFILE | SALLY | | 11/15/2012 | I | | Active/Certified | 11/14/2013 | SARAH REDFILE
F00200000005 | | REDFILE | SARA | | 7/7/1987 | | | | | |
F00200000005 | KS0020000011 | REDFILE | SARA | | 7/7/1987 | B | | Active/Certified | 11/14/2013 | SARA REDFILE
F00200000005 | KS0020000012 | REDFILE | SALLY | | 11/15/2012 | I | | Active/Certified | 11/14/2013 | SARA REDFILE
Selected Row Details

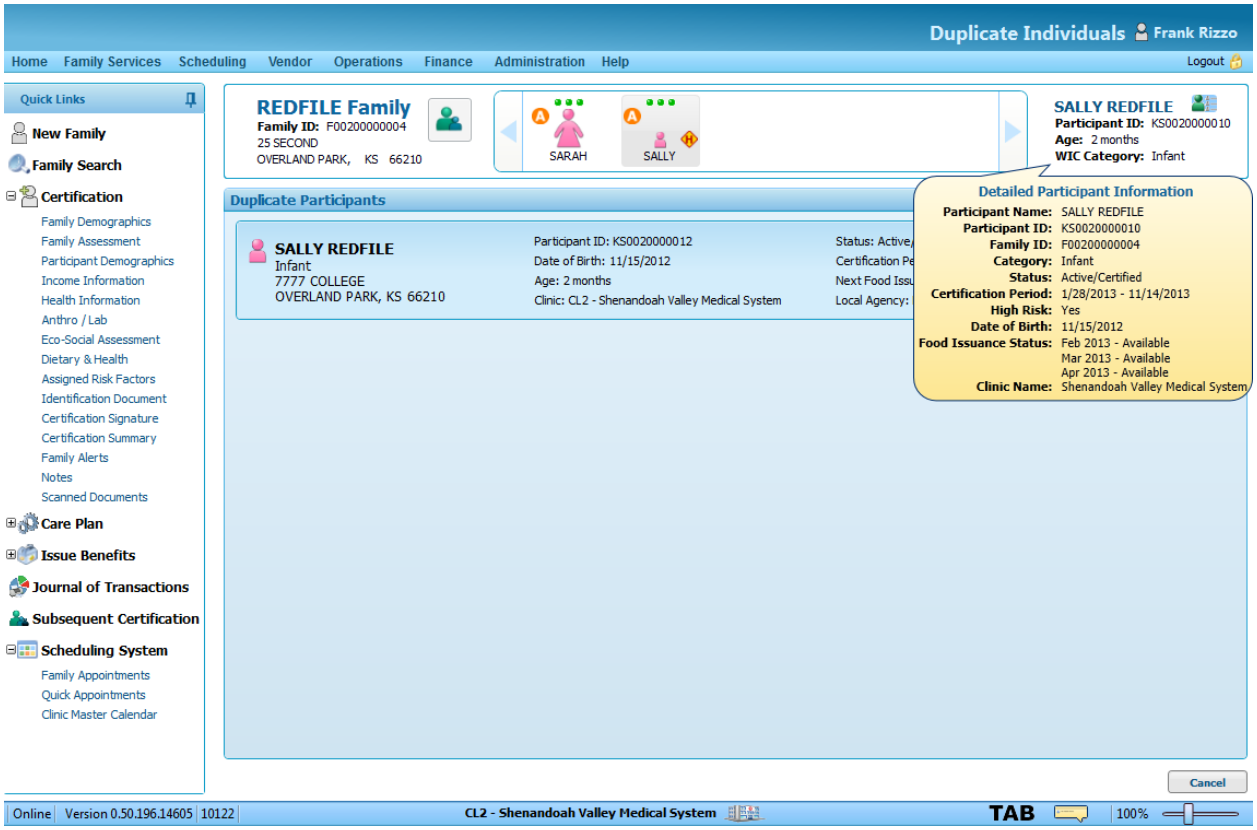
10. On the **Family Demographics** screen, a new icon displays in the family header indicating the link.



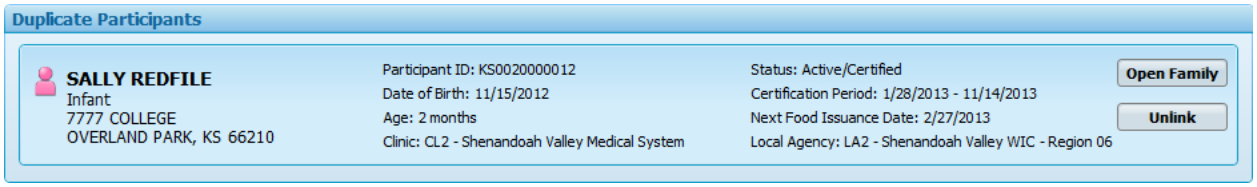
11. Hover over the icon with your mouse to display additional information.



12. Click on the icon to view linked individuals. The **Duplicate Individuals** screen displays and a **Detailed Participant Information** message also displays.



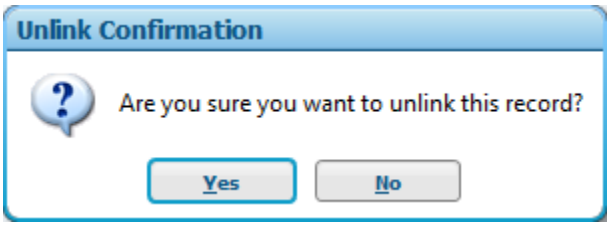
13. Under **Duplicate Participants**, click the duplicate individual listed to dismiss the **Detailed Participant Information** message. The duplicate individual's details display.



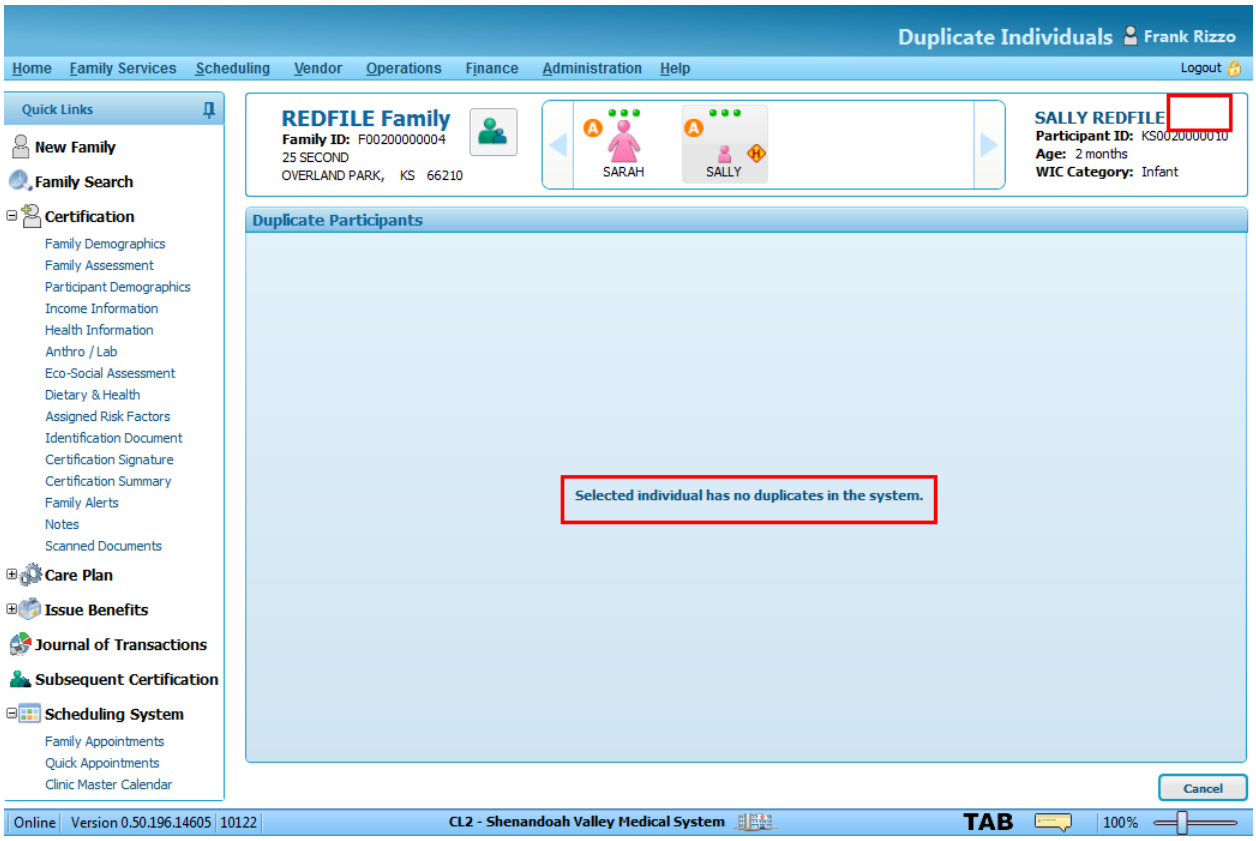
To open and review the linked individual's family record, you can click **Open Family**. The **Family Demographics** screen displays for the linked individual's household and the head of household displays.

If the records were linked in error, you can click **Unlink** to undo the process. For the purposes of this task, we'll unlink the individuals.

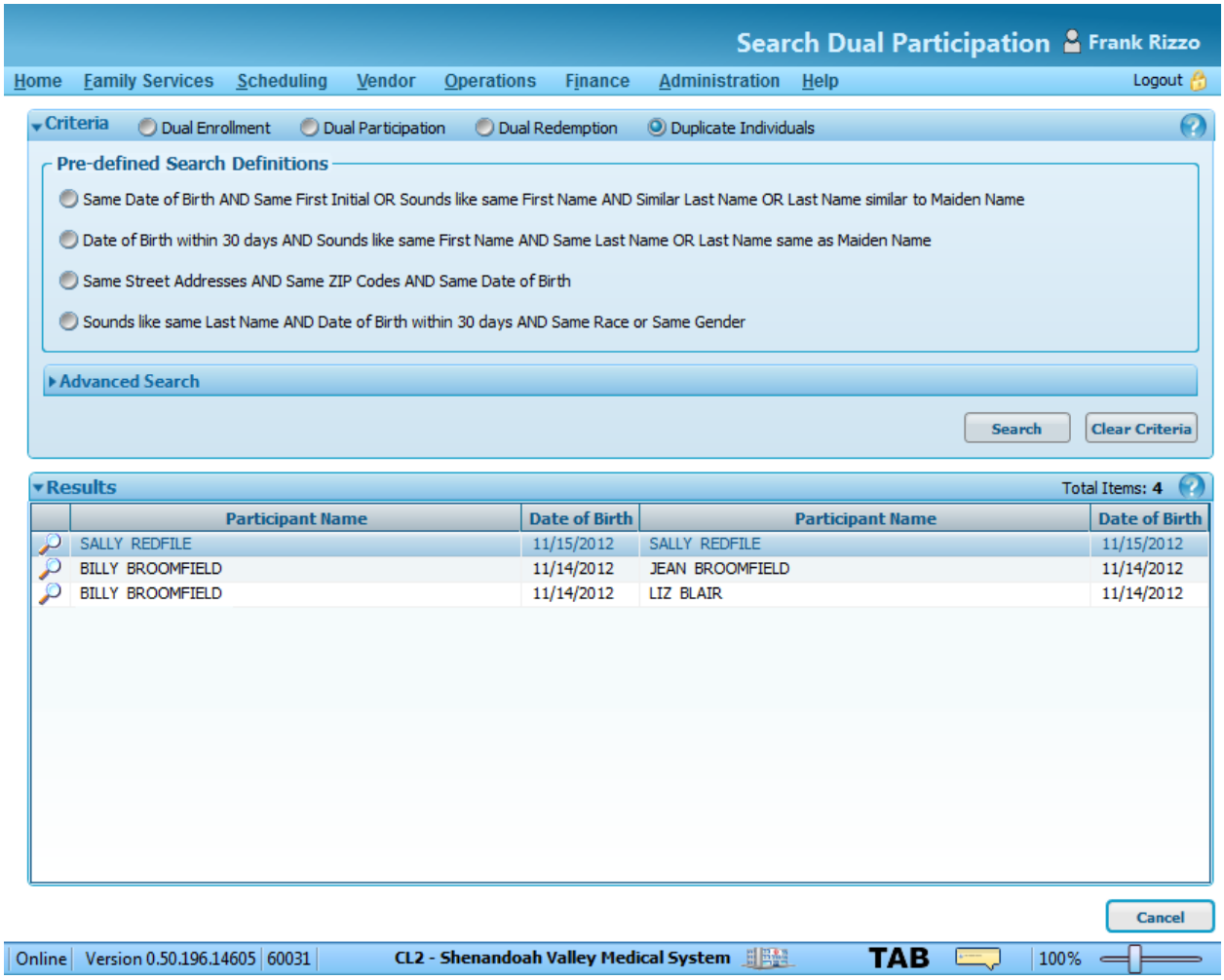
14. Click **Unlink**. The **Unlink Confirmation** screen displays.



15. Click **Yes** to remove the link. The **Duplicate Individuals** screen refreshes. In this example, no additional duplicate individuals exist; therefore, a message displays under **Duplicate Participants**. Also, the linked icon that was added to the family header after the link was created is removed.



Since the link was removed, the two participants may once again display as search results in the **Results** grid when future searches are performed on the **Search Dual Participation** screen.



Congratulations!

You have successfully completed the **Search Dual Participation** process.

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4- MAINTAIN CUSTOMER SERVICE ISSUES

Maintain Customer Service Issues

This scenario describes the process of adding, searching, editing, and assigning customer service issues. Customer service issues can be added about families, WIC staff, and vendors (as well as anonymous sources) and then assigned to a user role at the state, local agency, or clinic-level.

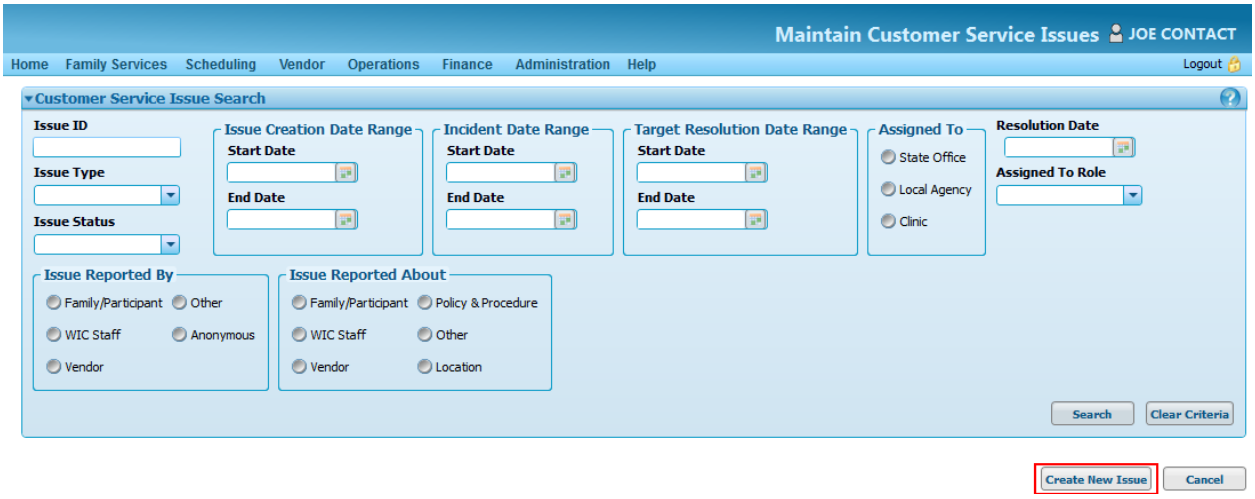
This process includes the following tasks:

Task A. Adding a Customer Service Issue 4-2
Task B. Searching for Customer Service Issues 4-4
Task C. Editing a Customer Service Issue 4-9
Task D. Assigning a Customer Service Issue 4-11

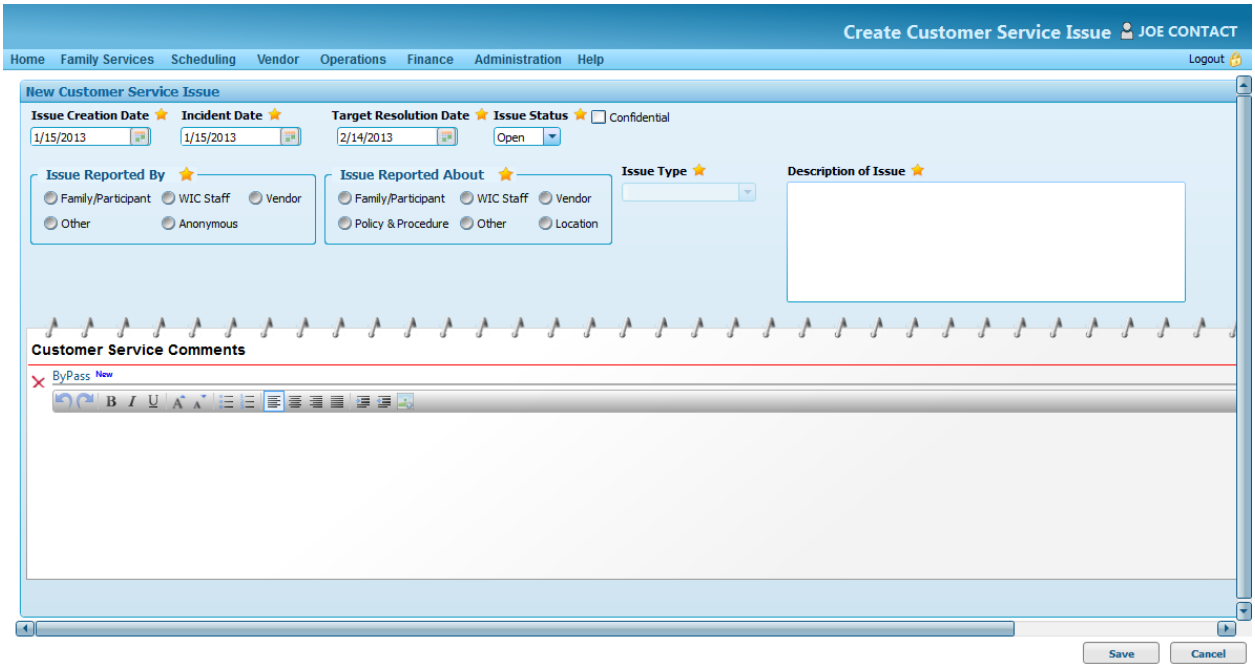
Task A. Adding a Customer Service Issue

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → Maintain Customer Service Issues**. The **Maintain Customer Service Issues** screen displays.



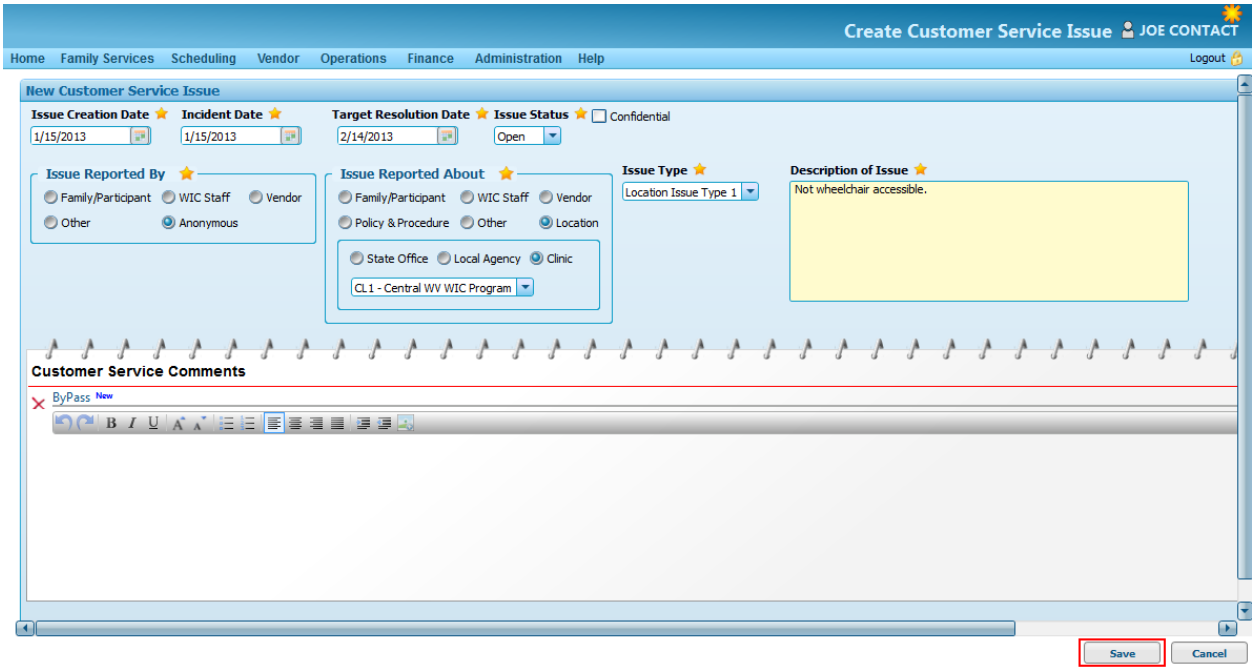
2. Click **Create New Issue**. The **Create Customer Service Issue** screen displays.



3. Enter or select an **Issue Creation Date**.
4. Enter or select an **Incident Date**.
5. Enter a **Target Resolution Date**.
6. Select an **Issue Status**.
7. Check **Confidential**, if necessary.

The Confidential indicator limits which users can see the issue based on their security permissions.

8. Select an **Issue Reported By** option.
9. Select an **Issue Reported About** option.
10. Select an **Issue Type**.
11. Enter a **Description of Issue**.
12. Enter a **Comment**, if necessary.



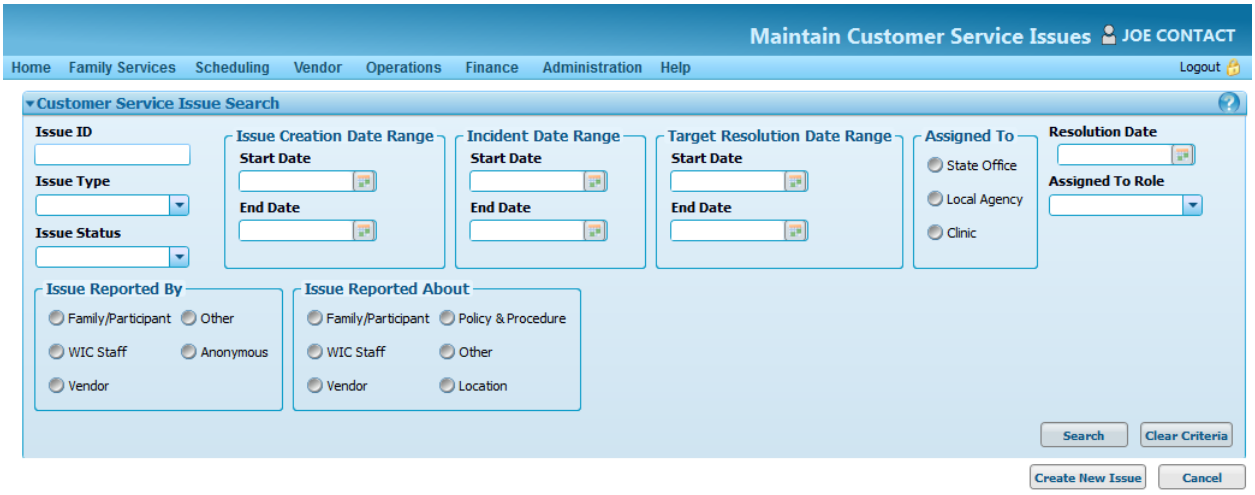
13. Click **Save**. A confirmation screen displays with the message: "Would you like to Assign this Customer Issue?"
    - Click **Yes** to assign the issue.
    - Or, click **No** to return to the **Maintain Customer Service Issues** screen.

Newly created customer service issues can be assigned to the state, a local agency, or a clinic location. (For more detail, see Task D of this scenario.)

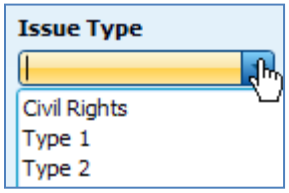
Task B. Searching for Customer Service Issues

Complete the following steps to perform this task:

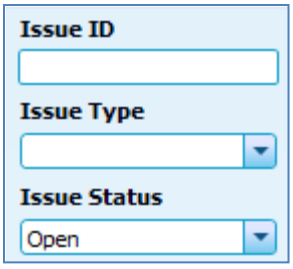
1. From the **Home** screen, go to **Operations** → **Maintain Customer Service Issues**. The **Maintain Customer Service Issues** screen displays.



2. Under **Customer Service Issue Search**, complete one or more of the following criteria:
   - Enter an **Issue ID**.
   - Select an **Issue Type**.



   - Select an **Issue Status**.

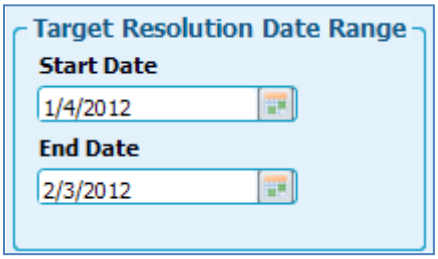


3. Within **Issue Creation Date Range**, enter or select the following:
   - Enter or select a **Start Date**.
   - Enter or select an **End Date**.

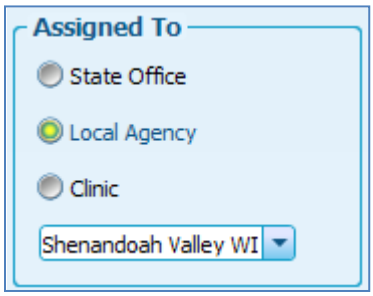
The Start Date defaults to today's date.

4. Within **Incident Date Range**, enter or select the following:
   - Enter or select a **Start Date**.
   - Enter or select an **End Date**.

5. Within **Target Resolution Date Range**, enter or select the following:
   - Enter or select a **Start Date**.
   - Enter or select an **End Date**.

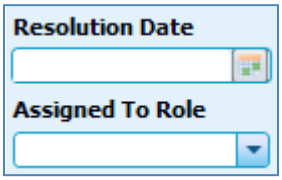


6. Within **Assigned To**, choose one of the following:
    - **State Office**
    - **Local Agency**
    - **Clinic**

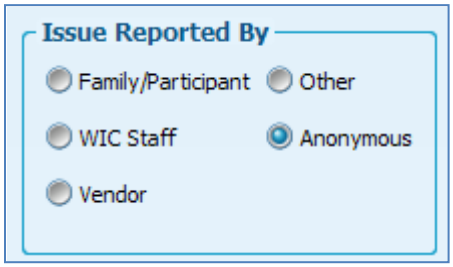


If an Assigned To option is selected for the search, use the associated drop down list to further refine search criteria.

7. Enter or select a **Resolution Date**.
8. Enter or select an **Assigned to Role** option.

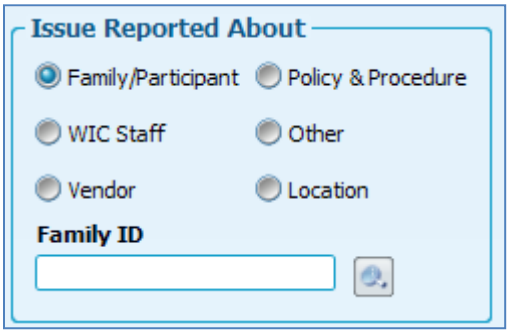


9. Under **Issue Reported By**, select one of the following:
    - **Family/Participant**
    - **Other**
    - **WIC Staff**
    - **Anonymous**
    - **Vendor**



10. Under **Issue Reported About**, select one of the following:

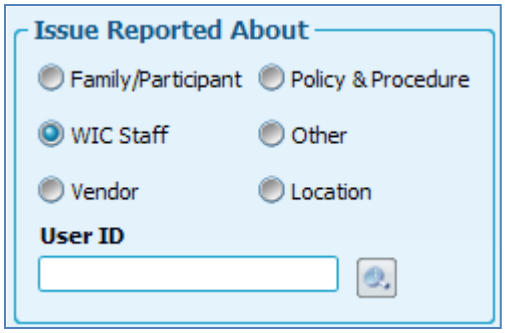
- **Family/Participant**



A uniquely titled box displays for each option when selected. Use the associated box to further refine search criteria.

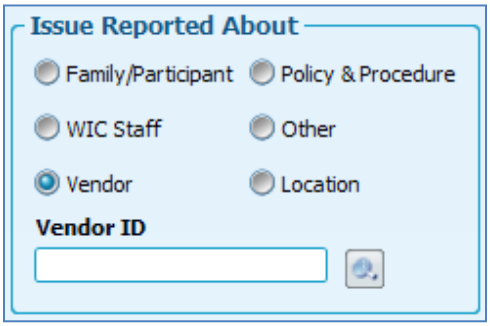
- **Policy & Procedure**

- **WIC Staff**

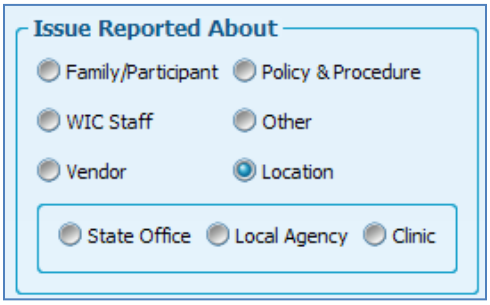


- **Other**

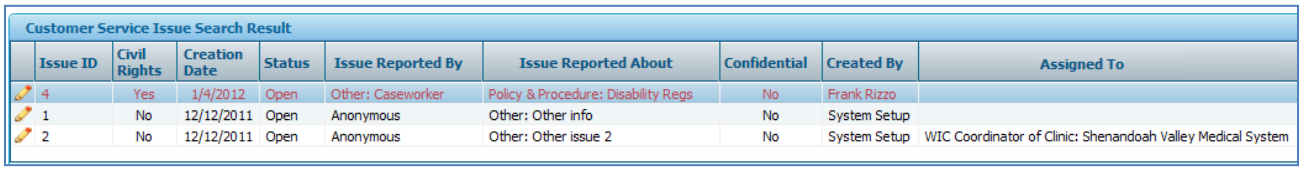
- **Vendor**



- **Location**



11. Click **Search**. The results of the search are displayed in the **Customer Service Issue Search Results** grid.



Customer Service Issue Search Result

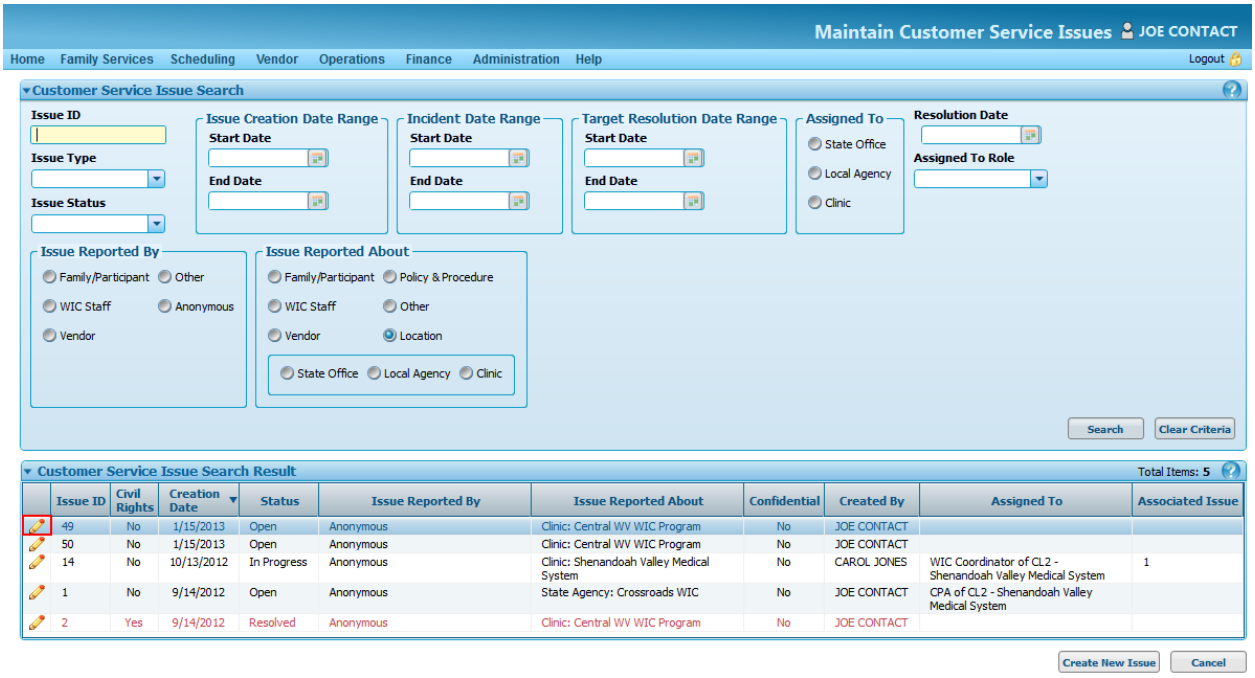
Issue ID	Civil Rights	Creation Date	Status	Issue Reported By	Issue Reported About	Confidential	Created By	Assigned To
4	Yes	1/4/2012	Open	Other: Caseworker	Policy & Procedure: Disability Regs	No	Frank Rizzo	
1	No	12/12/2011	Open	Anonymous	Other: Other info	No	System Setup	
2	No	12/12/2011	Open	Anonymous	Other: Other issue 2	No	System Setup	WIC Coordinator of Clinic: Shenandoah Valley Medical System

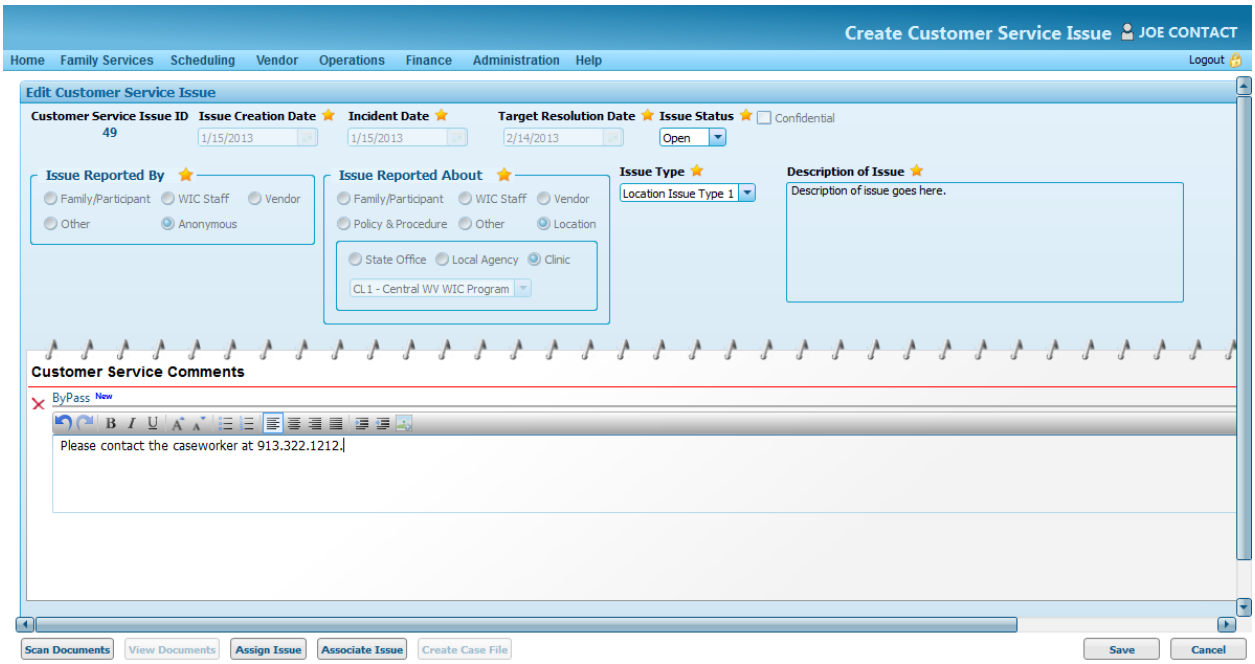
Civil Rights customer service issues display in red text.

Task C. Editing a Customer Service Issue

Complete the following steps to perform this task:

1. Click the **Edit** button ( ) to edit the selected issue. The **Create Customer Service Issue** screen displays.





2. Edit (or add) one or more of the following, if necessary:
    - **Issue Type**
    - **Issue Status**
    - **Comments**

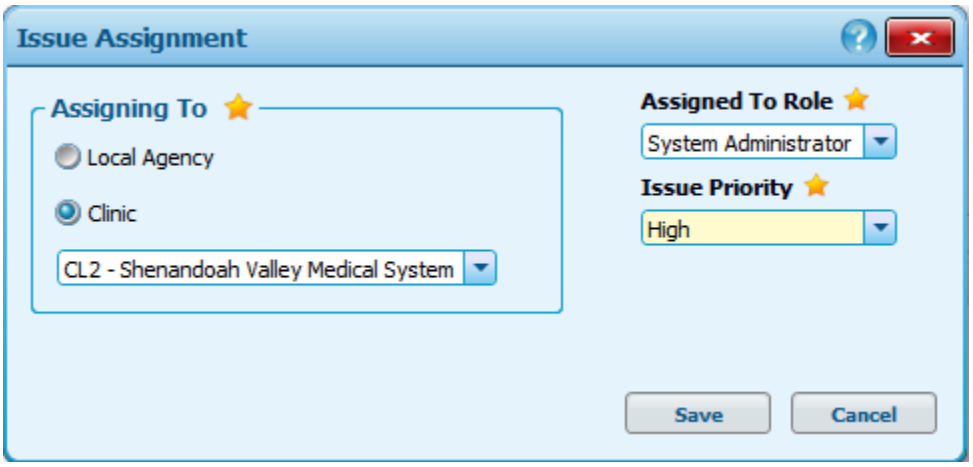
All options are disabled and cannot be edited except for the items noted above.

3. Click **Save** to save the issue after editing.

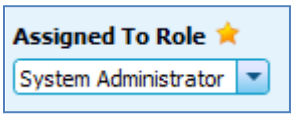
Task D. Assigning a Customer Service Issue

Complete the following steps to perform this task:

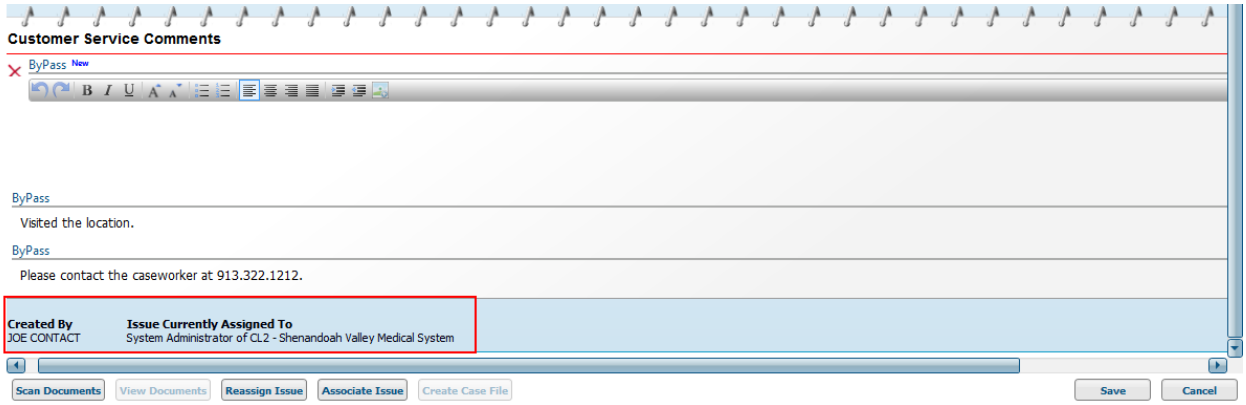
1. Click **Assign Issue**. The **Issue Assignment** screen displays.



2. Within **Assigning To**, select the desired option.
3. Use the associated drop down list to further refine assignment options.
4. Select a role from **Assigned to Role**.



5. Select the **Issue Priority**.
6. Click **Save**. A status message displays indicating success. You are returned to the **Create Customer Service Issue** screen and it is updated to display the assignment information.



Once an issue has been assigned, click Reassign Issue to change the assignment of the issue.

Click Associate Issue to associate the issue to another customer service issue having the same Reported By and/or Reported About information.

7. Click **Save**. A status message displays indicating success. You are returned to the **Maintain Customer Service Issues** screen and the selected issue has been assigned.

Congratulations!

You have successfully completed the **Maintain Customer Service Issues** process.

5- NOTIFICATIONS

Notifications

The **Notifications** screen allows you to manage notifications and send communications to WIC participants by e-mail/text, print, or phone.

This process includes the following tasks:

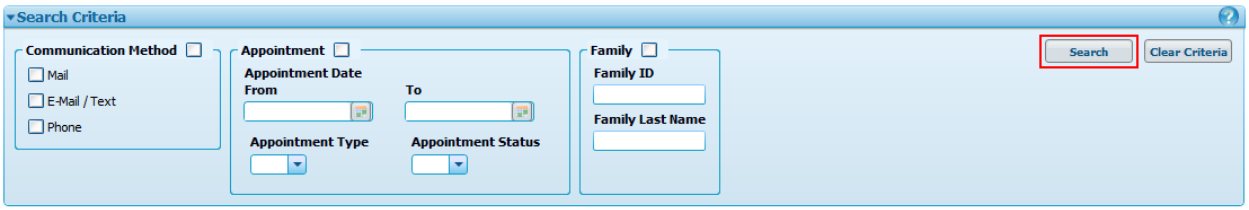
Task A. Searching for Notifications 5-2
Task B. Previewing and Printing a Single Notification 5-3
Task C. Printing Multiple Notifications..... 5-5
Task D. E-mail/Text Multiple Notifications 5-7
Task E. Completing Multiple Notifications by Phone..... 5-9
Task F. Deleting Notifications from the Queue..... 5-10

Task A. Searching for Notifications

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → Notifications**. The **Notifications** screen displays.

2. Under **Search Criteria**, select one or more options to search for notifications.
3. Click **Search**. The screen refreshes and displays the results in the **Search Results** grid.



The Search Results grid displays appointment communications and includes the Family ID, Parent/Guardian Name, Communication Preference, Communication Type, and any Attachments.

Click a column header to sort the results of the search (example below). Click and hold, then drag and drop columns of information to reorganize the order of the columns in the grid (not shown).

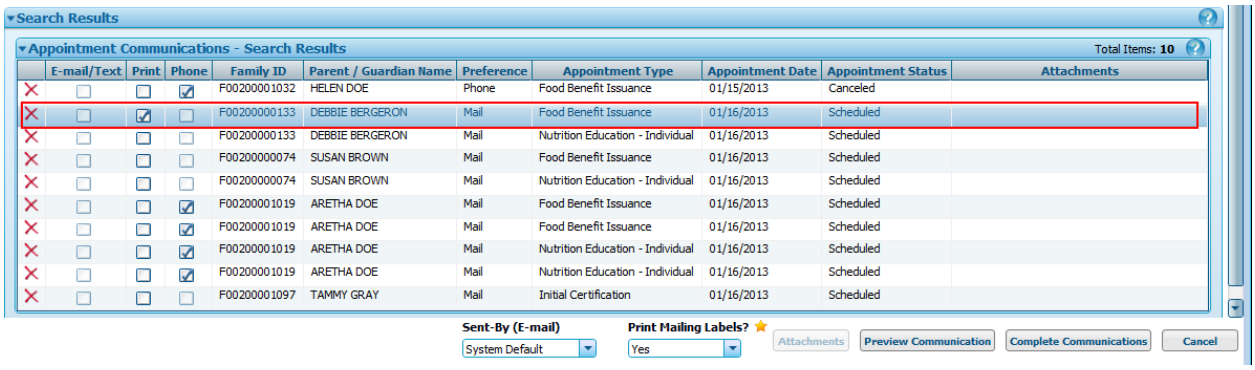
Task B. Previewing and Printing a Single Notification

Complete the following steps to perform this task:

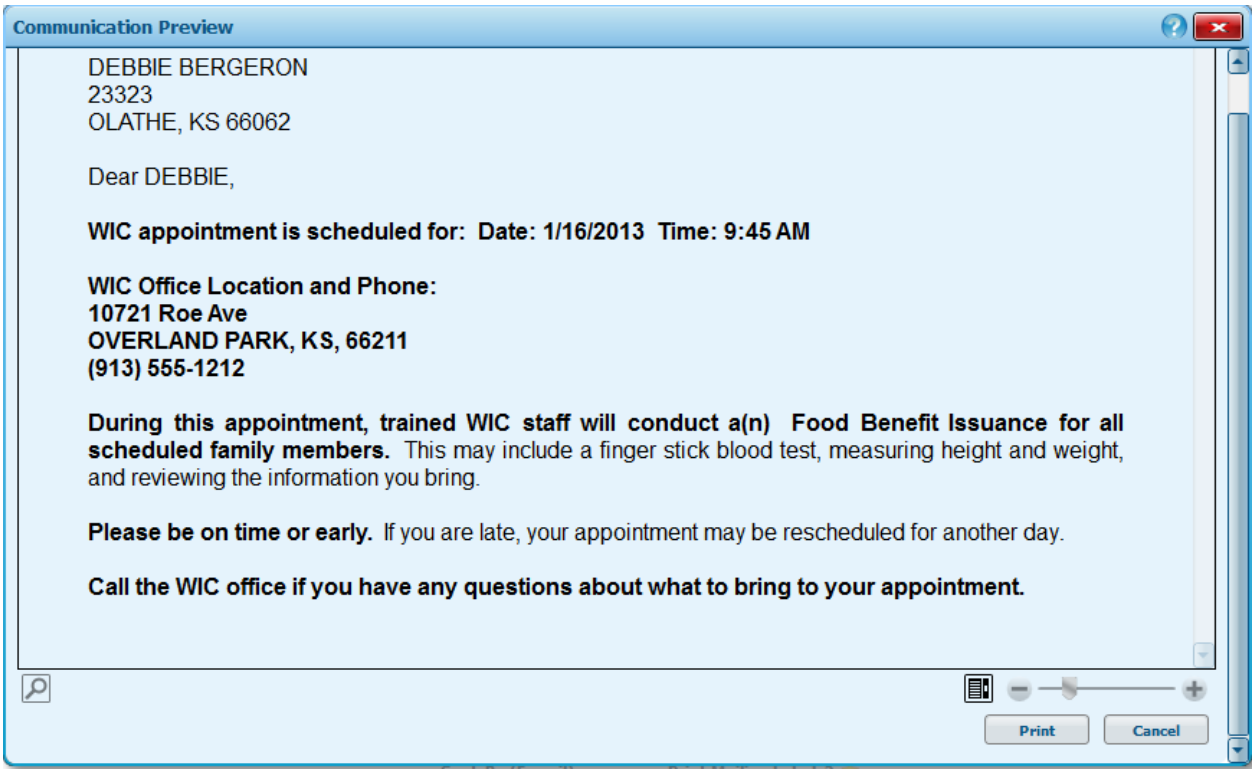
1. Access the **Notifications** screen and conduct a search.

The Notifications screen displays the notification text as it will appear when printed. Printing is for the physical printing of communications. In the Communication Method section email, mail, or phone checked boxes refer to the preferred method of contact for the family. If the family is flagged as “Do Not Contact” or "Confidential", no notification record is created.

2. Select a record in the **Search Results** grid and check the **Print** box.


Search Results
Appointment Communications - Search Results
Total Items: 10
E-mail/Text
Print
Phone
Family ID
Parent / Guardian Name
Preference
Appointment Type
Appointment Date
Appointment Status
Attachments
F00200001032 HELEN DOE Phone Food Benefit Issuance 01/15/2013 Canceled
F00200000133 DEBBIE BERGERON Mail Food Benefit Issuance 01/16/2013 Scheduled
F00200000133 DEBBIE BERGERON Mail Nutrition Education - Individual 01/16/2013 Scheduled
F00200000074 SUSAN BROWN Mail Food Benefit Issuance 01/16/2013 Scheduled
F00200000074 SUSAN BROWN Mail Nutrition Education - Individual 01/16/2013 Scheduled
F00200001019 ARETHA DOE Mail Food Benefit Issuance 01/16/2013 Scheduled
F00200001019 ARETHA DOE Mail Food Benefit Issuance 01/16/2013 Scheduled
F00200001019 ARETHA DOE Mail Nutrition Education - Individual 01/16/2013 Scheduled
F00200001019 ARETHA DOE Mail Nutrition Education - Individual 01/16/2013 Scheduled
F00200001097 TAMMY GRAY Mail Initial Certification 01/16/2013 Scheduled
Sent-By (E-mail)
System Default
Print Mailing Labels?
Yes
Attachments
Preview Communication
Complete Communications
Cancel

3. Select **Yes** if you would like to **Print Mailing Labels**.
4. Click **Preview Communication**. The **Communication Preview** screen displays.


Communication Preview
DEBBIE BERGERON
23323
OLATHE, KS 66062
Dear DEBBIE,
WIC appointment is scheduled for: Date: 1/16/2013 Time: 9:45 AM
WIC Office Location and Phone:
10721 Roe Ave
OVERLAND PARK, KS, 66211
(913) 555-1212
During this appointment, trained WIC staff will conduct a(n) Food Benefit Issuance for all scheduled family members. This may include a finger stick blood test, measuring height and weight, and reviewing the information you bring.
Please be on time or early. If you are late, your appointment may be rescheduled for another day.
Call the WIC office if you have any questions about what to bring to your appointment.
Print
Cancel

The Communication Preview screen displays the notification text as it will appear when printed.

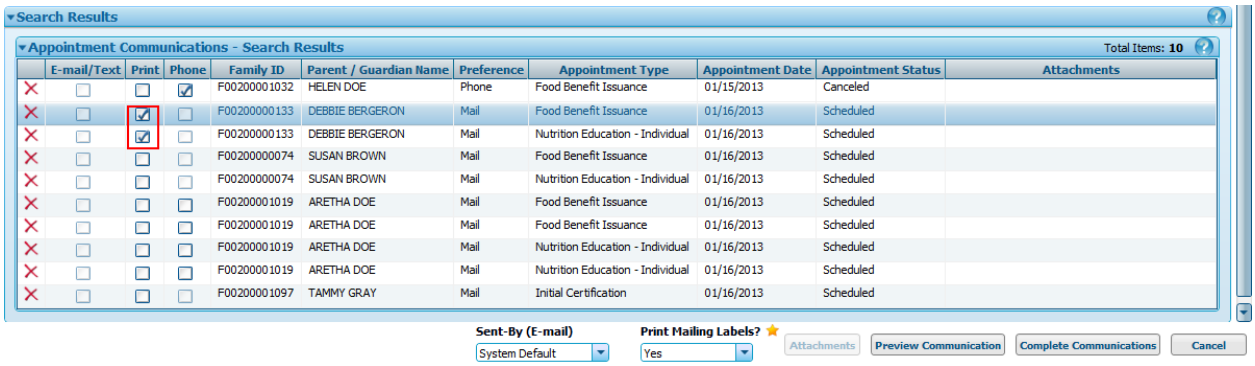
5. Click **Print**. A standard Windows Print screen displays and allows you to select a printer.

Task C. Printing Multiple Notifications

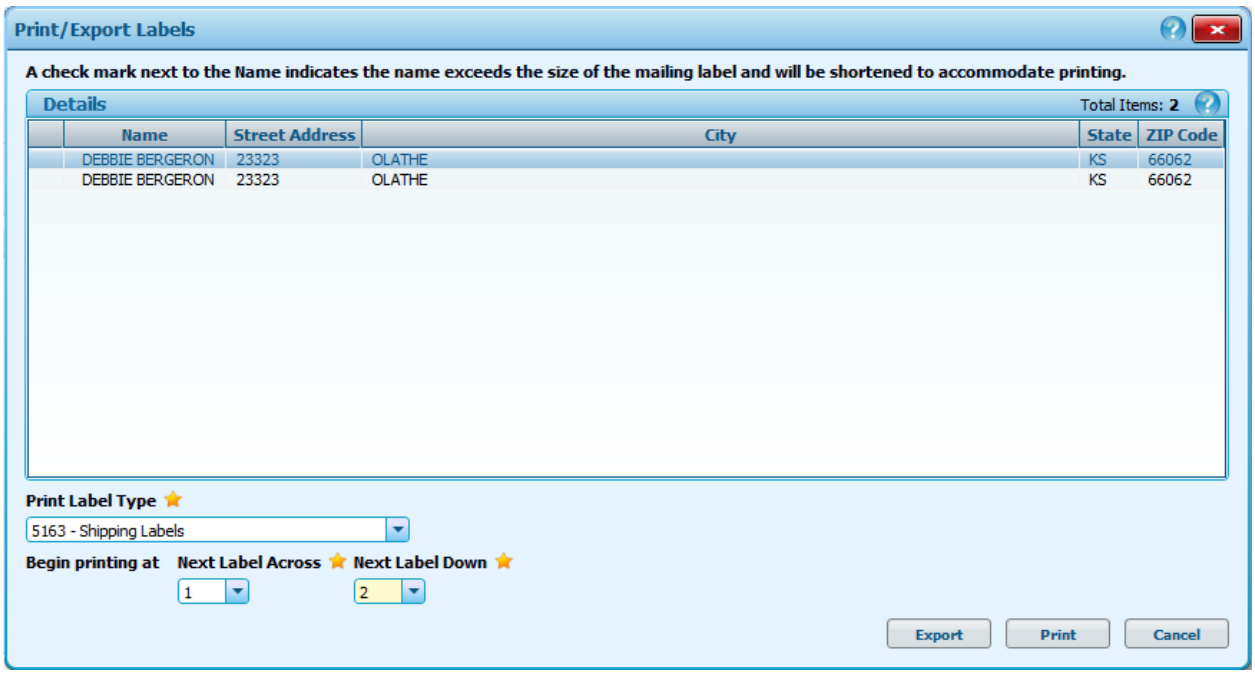
Complete the following steps to perform this task:

1. Access the **Notifications** screen and conduct a search.

2. Check the **Print** check box for one or more records in the **Search Results** grid.


Search Results
Appointment Communications - Search Results
Total Items: 10
E-mail/Text
Print
Phone
Family ID
Parent / Guardian Name
Preference
Appointment Type
Appointment Date
Appointment Status
Attachments
F00200001032 HELEN DOE Phone Food Benefit Issuance 01/15/2013 Canceled
F00200000133 DEBBIE BERGERON Mail Food Benefit Issuance 01/16/2013 Scheduled
F00200000133 DEBBIE BERGERON Mail Nutrition Education - Individual 01/16/2013 Scheduled
F00200000074 SUSAN BROWN Mail Food Benefit Issuance 01/16/2013 Scheduled
F00200000074 SUSAN BROWN Mail Nutrition Education - Individual 01/16/2013 Scheduled
F00200001019 ARETHA DOE Mail Food Benefit Issuance 01/16/2013 Scheduled
F00200001019 ARETHA DOE Mail Food Benefit Issuance 01/16/2013 Scheduled
F00200001019 ARETHA DOE Mail Nutrition Education - Individual 01/16/2013 Scheduled
F00200001019 ARETHA DOE Mail Nutrition Education - Individual 01/16/2013 Scheduled
F00200001097 TAMMY GRAY Mail Initial Certification 01/16/2013 Scheduled
Sent-By (E-mail)
System Default
Print Mailing Labels?
Yes
Attachments
Preview Communication
Complete Communications
Cancel

3. Select **Yes** if you would like to **Print Mailing Labels**.
4. Click **Complete Communications**. A status message displays and the notifications will be printed automatically. Additionally, the **Print/Export Labels** screen displays if you chose to **Print Mailing Labels**.



The Print/Export Labels screen displays the Name, Street Address, City, State, and ZIP Code to be printed on the mailing labels.

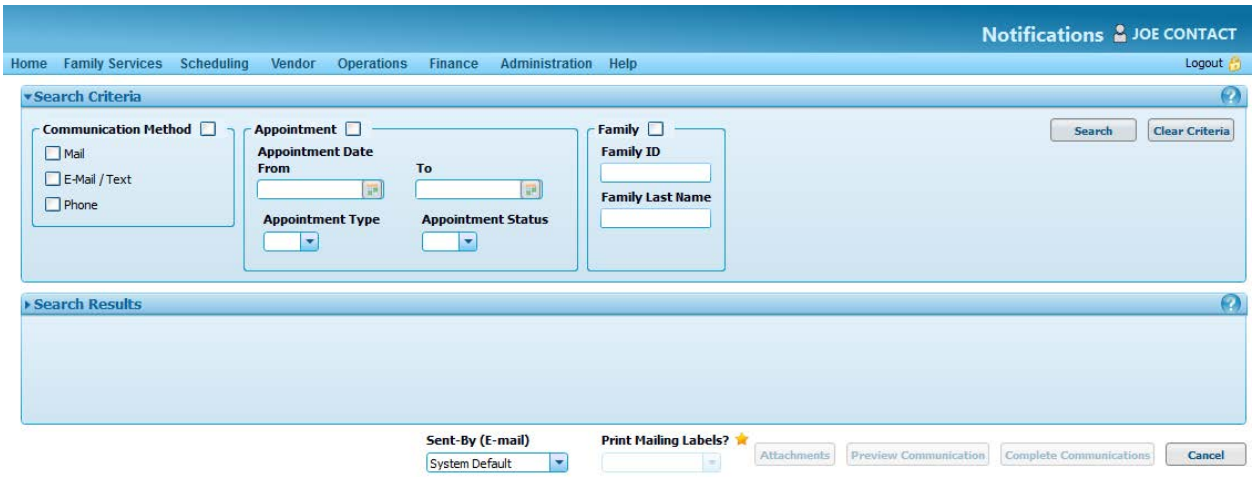
5. Select the **Print Label Type**.
6. Select the **Next Label Across** at which to begin printing.
7. Select the **Next Label Down** at which to begin printing.
8. Click **Export** to export the labels. A status message displays.
9. Or, click **Print** to print the labels. A standard Windows Print screen displays and allows you to select a printer.

Task D. E-mail/Text Multiple Notifications

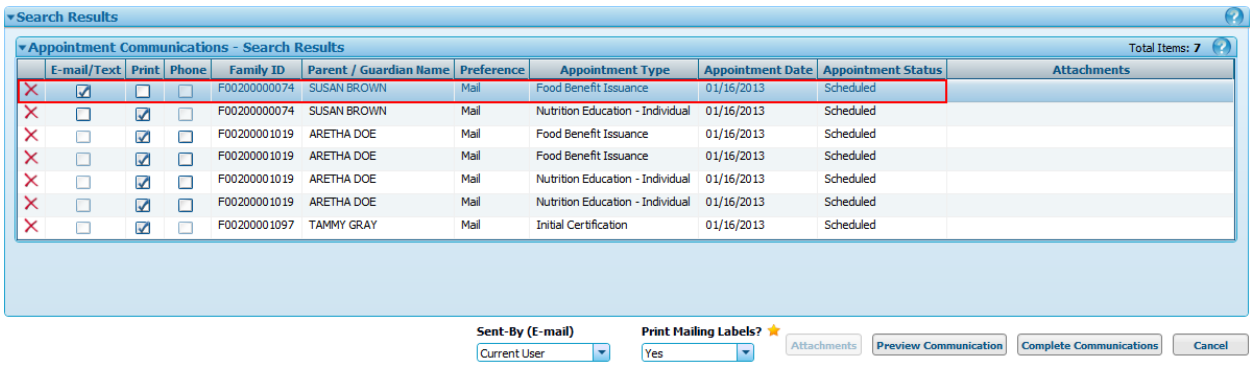
Complete the following steps to perform this task:

1. Access the **Notifications** screen and conduct a search.

For both e-mail and auto-dialer, nightly batch processing takes care of sending the communications. Printing for physical mail is the only manual process.



2. Check the **E-mail/Text** box for one or more records in the **Search Results** grid.



The E-mail/Text box can be checked if the family selected email or text as their preferred method of contact.

3. Select the **Sent-By (E-mail)**. This is the user or agency address that will appear in the **From** section of the e-mail.

Click Attachments if you would like to add an attachment to the communication.

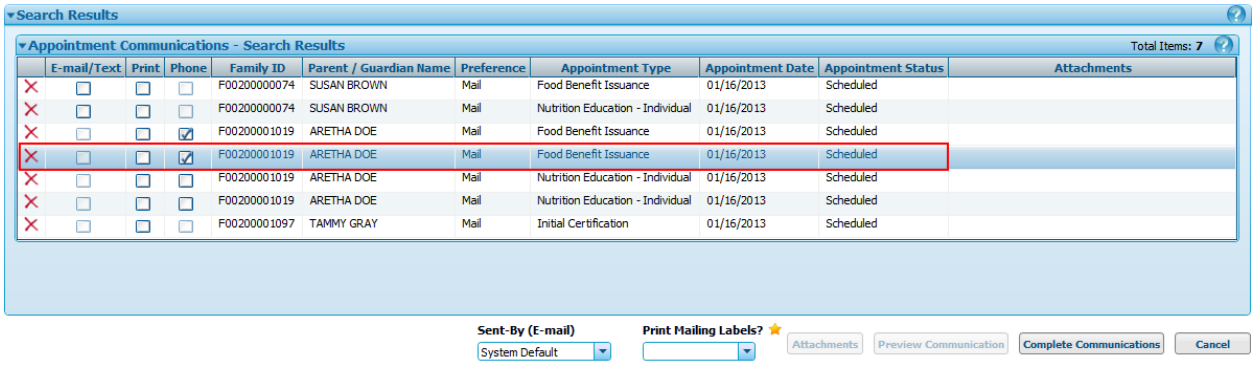
4. Click **Complete Communications**. A status message displays and the notifications will be e-mailed during the nightly batch process.

Task E. Completing Multiple Notifications by Phone

Complete the following steps to perform this task:

1. Access the **Notifications** screen and conduct a search.

2. Observe the **Phone** column of the **Search Results** grid.



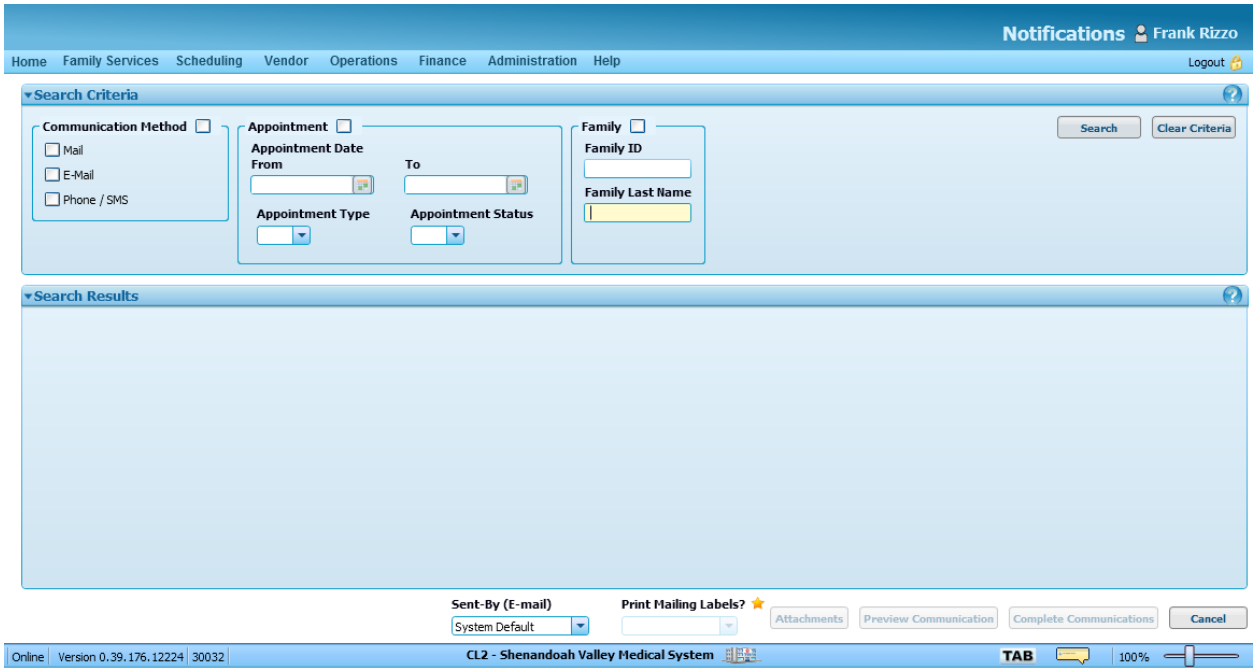
The Phone check box is checked if the family's preferred method of contact is by phone.

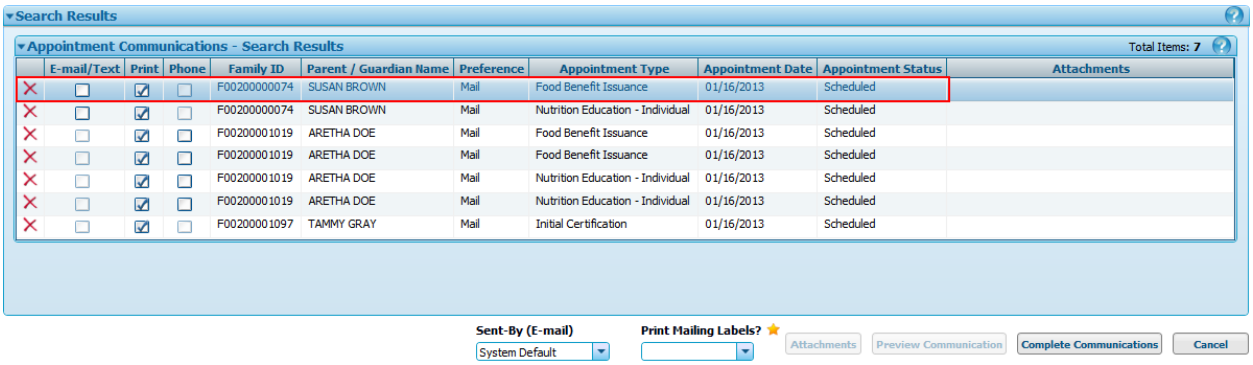
Deleting a row in the grid is the only other user action that can be taken since phone communication is controlled by the application's automated batch process.

Task F. Deleting Notifications from the Queue

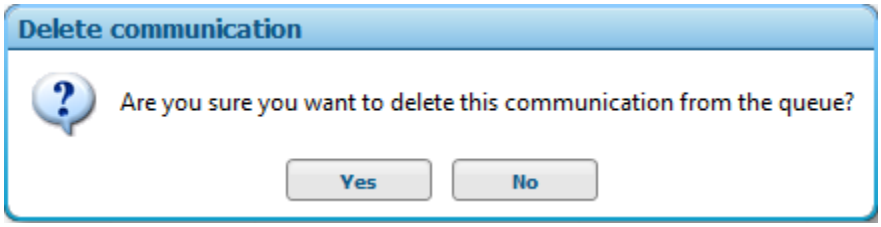
Complete the following steps to perform this task:

1. Access the **Notifications** screen and conduct a search.





2. Click the **Delete** button (✕) to remove a notification from the queue. The **Delete Communication** screen displays.



If the scheduled appointments shown in the grid are rescheduled, the queue will delete the "scheduled" notification and send info about the newly rescheduled appt. The same applies with cancelled. It will not send a scheduled and cancelled notification.

3. Click **Yes**. A status message displays and the notification is removed from the screen.

Congratulations!

You have successfully completed the **Notifications** process.

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6- MAINTAIN OUTREACH ORGANIZATIONS

Maintain Outreach Organizations

The system maintains contact lists of organizations and individuals such as health or social service organizations, church groups and physicians that have contact with potential WIC participants specific to each local agency and clinic. This information can be entered/updated at the state, local and/or clinic level. This scenario explains the process of capturing information on outreach organizations, sites and individuals for a clinic, local agency or state.

This process includes the following tasks:

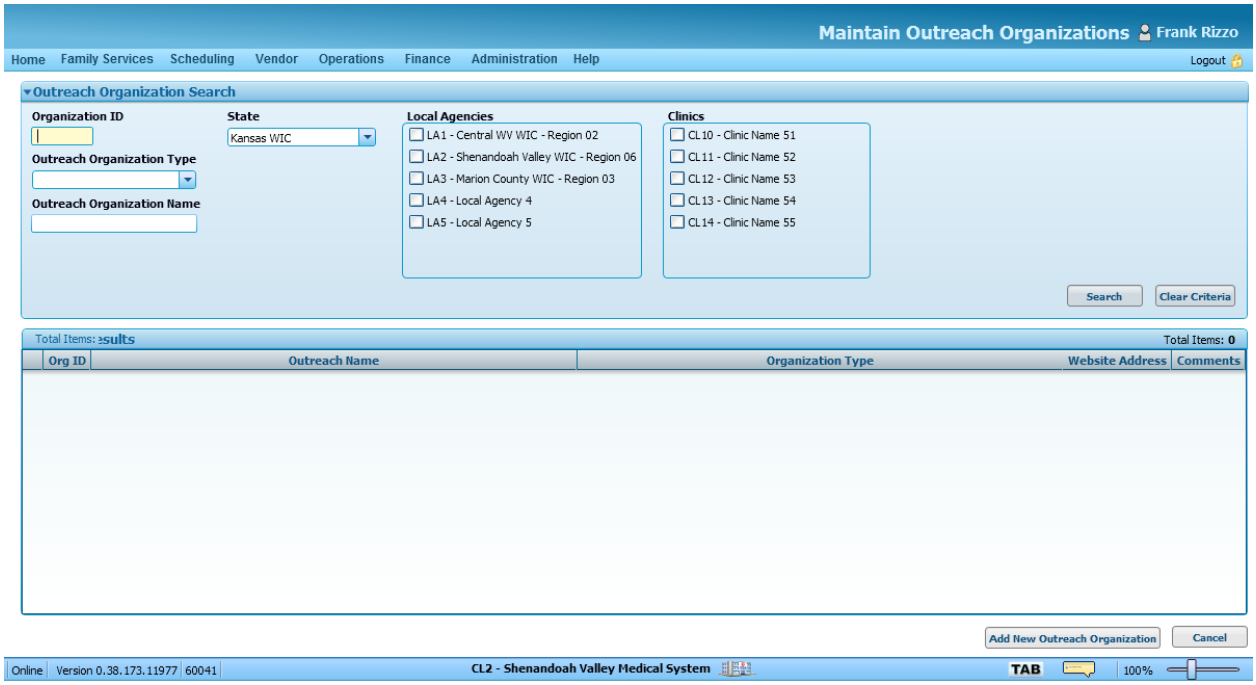
Task A. Adding a New Outreach Organization 6-2

Task B. Searching and Editing an Outreach Organization 6-7

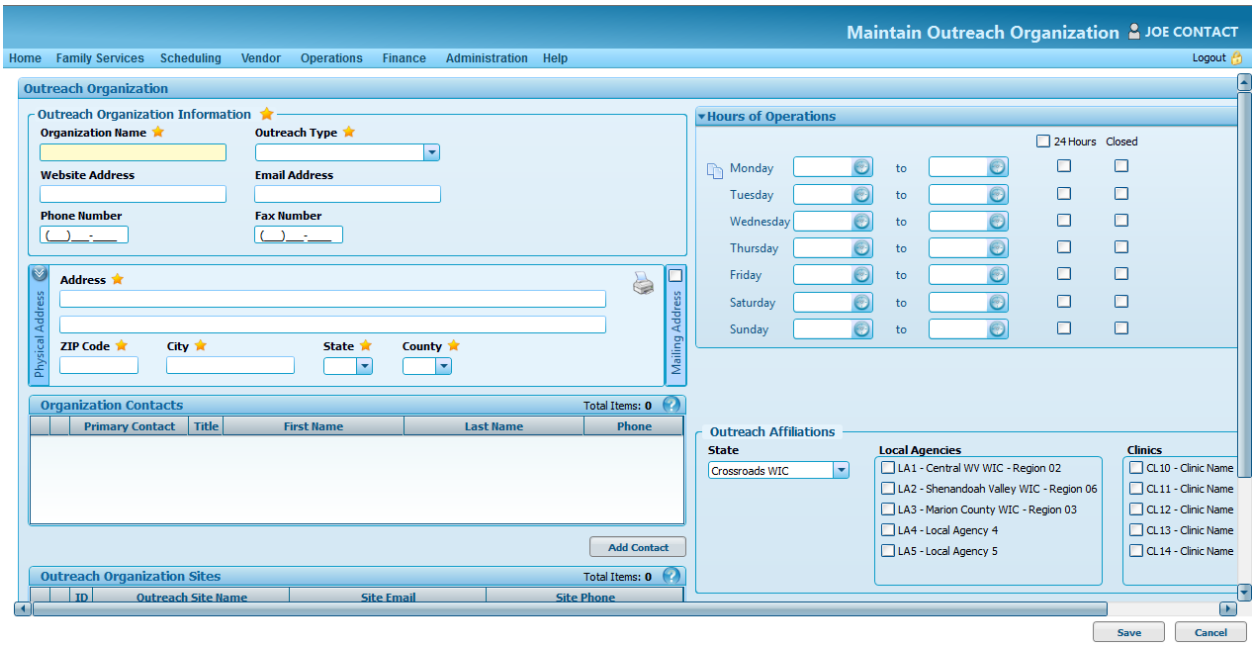
Task A. Adding a New Outreach Organization

Complete the following steps to perform this task:

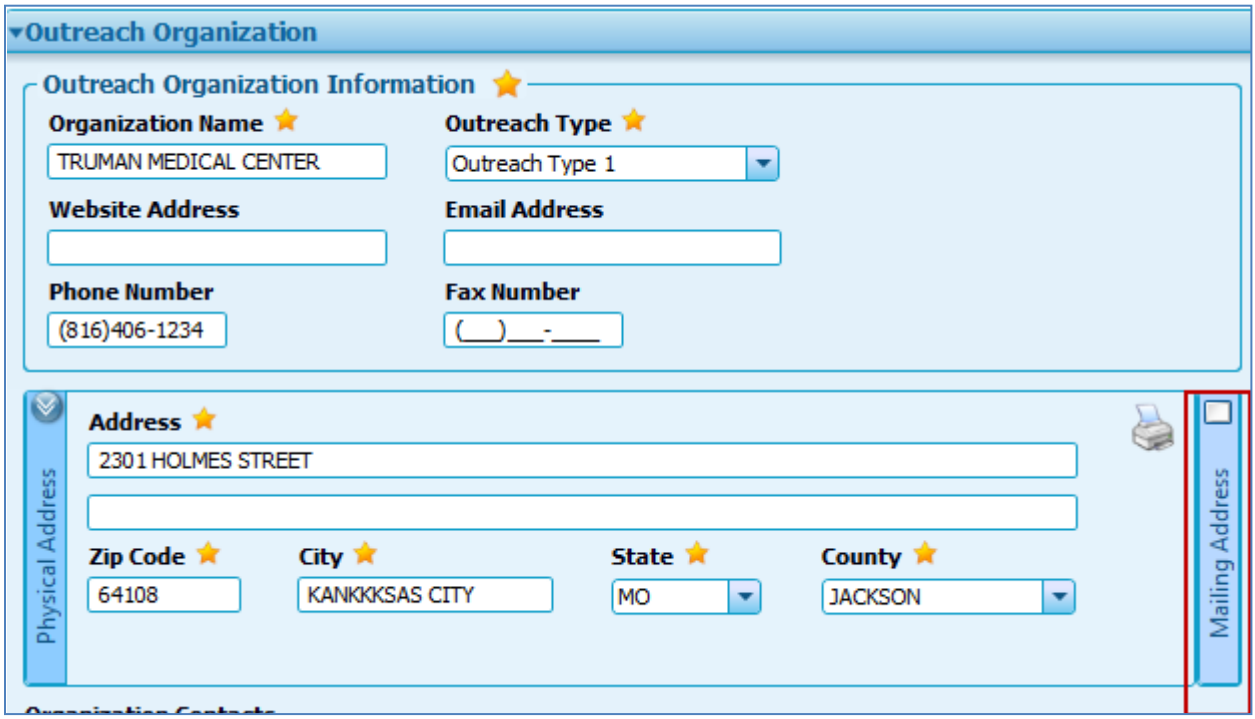
1. From the **Home** screen, go to **Operations → Maintain Outreach Organizations**. The **Maintain Outreach Organizations** screen displays.



2. Click **Add New Outreach Organization**. The **Maintain Outreach Organization** screen displays.

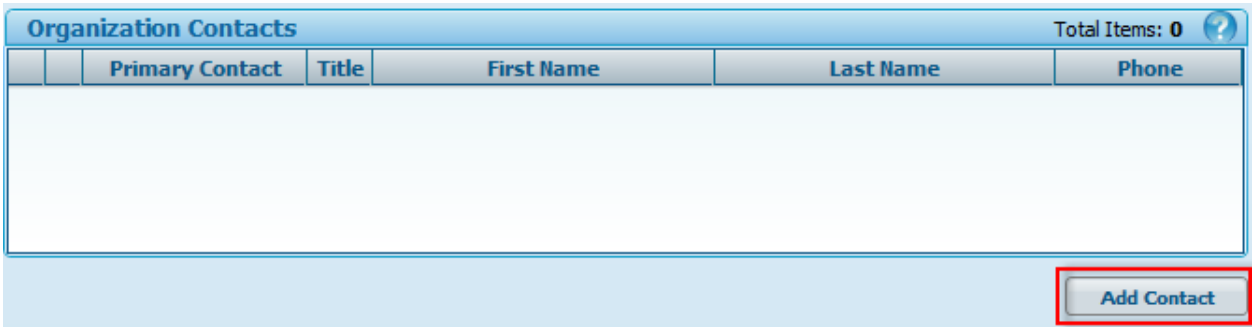


3. Under **Outreach Organization Information**, complete the following:
   - Enter the **Organization Name**.
   - Select the **Outreach Type**.
   - Enter the **Website Address**.
   - Enter the **Email Address** (optional).
   - Enter the **Phone Number** (optional).
   - Enter the **Fax Number** (optional).
   - Enter the **Physical Address**.

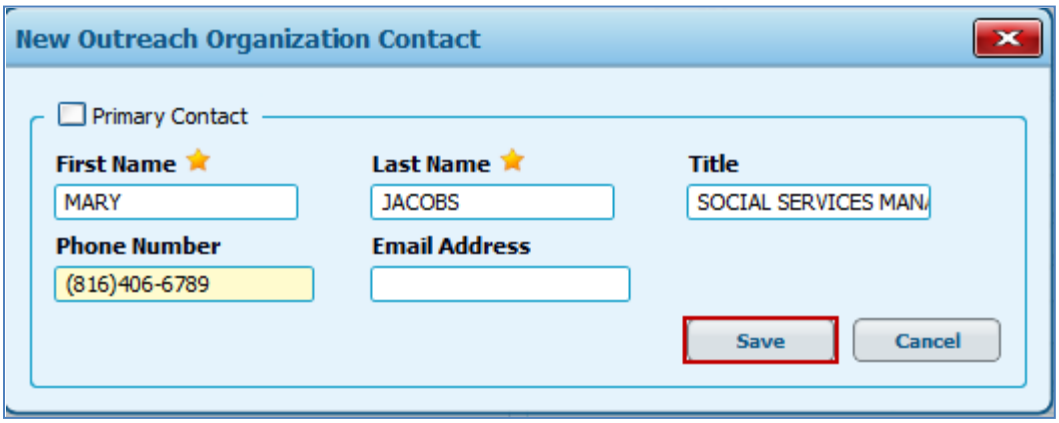


If the mailing address differs from the physical address, check the box on the mailing address slider and enter that address.

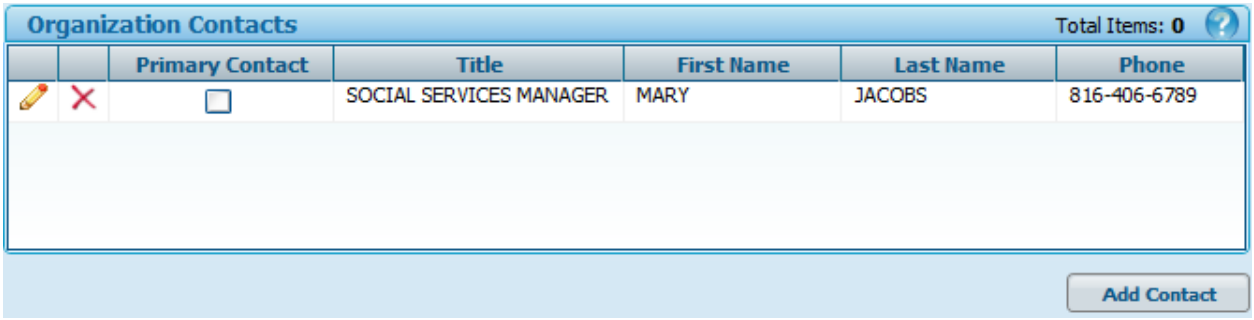
4. Under **Organization Contacts**, click **Add Contact**. The **New Outreach Organization Contact** screen displays.



5. Under **Primary Contact**, enter the following:
   - Enter the **First Name**.
   - Enter the **Last Name**.
   - Enter the **Title**.
   - Enter the **Phone Number** (optional).
   - Enter the **Email Address** (optional).



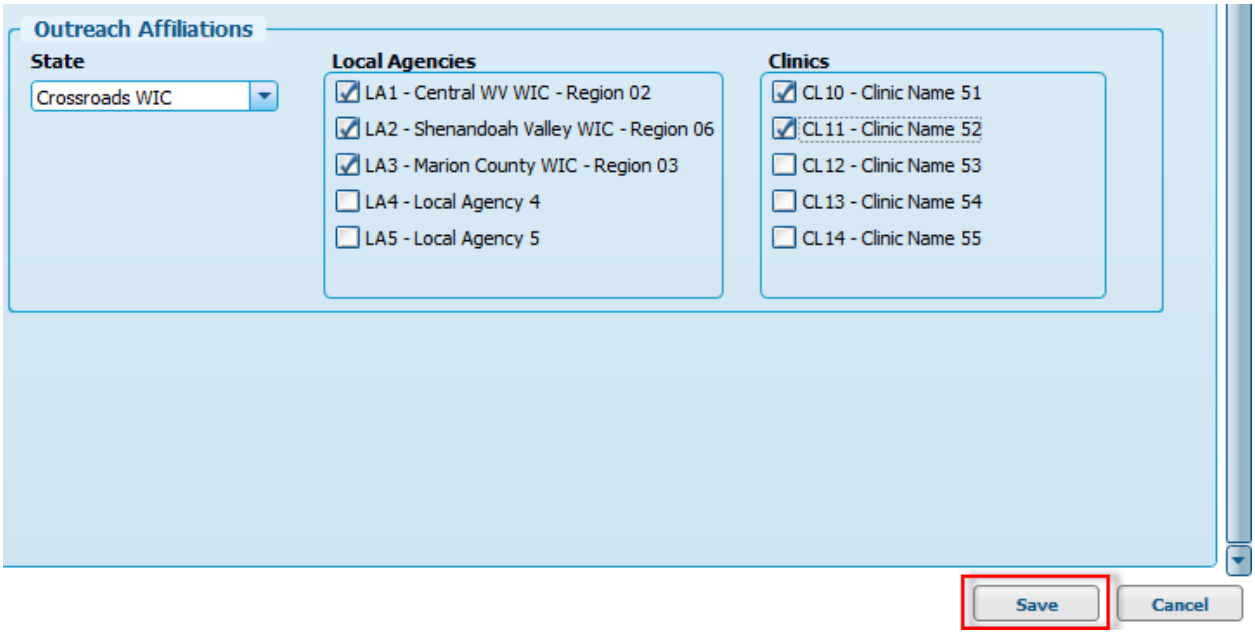
6. Click **Save**. The screen refreshes and the new contact information displays on the **Organization Contacts** grid.



7. Under **Hours of Operations**, complete the following for each day of the week:
   - Enter a **From** time.
   - Enter a **To** time.
   - Click the **24 hours** box, if applicable.
   - Click the **Closed** box for each day the outreach organization is not open for business.

To assign the same times for each day, enter the From and To times for Monday. Click on the icon in red. The Monday hours will then apply to each day of the week.

8. Under **Outreach Affiliations**, complete the following:
   - Select the **State**.
   - Click on one or more boxes assigned to the listed **Local Agencies**.
   - Select one or more **Clinics**.

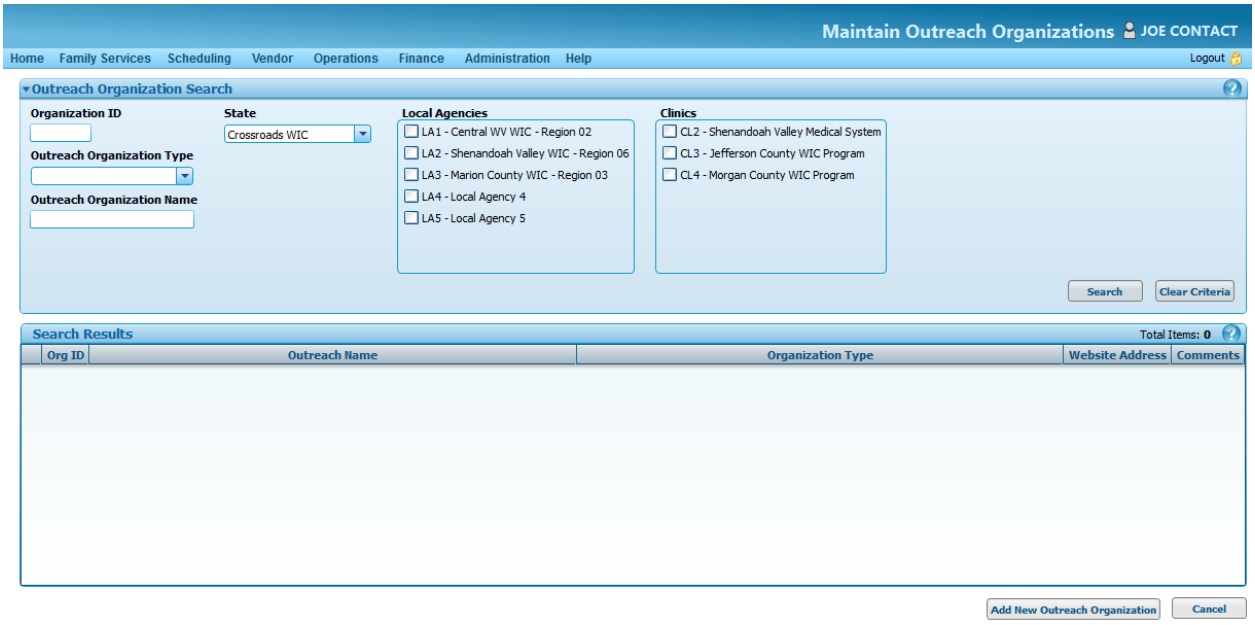

Outreach Affiliations
State
Crossroads WIC
Local Agencies
LA1 - Central WV WIC - Region 02
LA2 - Shenandoah Valley WIC - Region 06
LA3 - Marion County WIC - Region 03
LA4 - Local Agency 4
LA5 - Local Agency 5
Clinics
CL10 - Clinic Name 51
CL11 - Clinic Name 52
CL12 - Clinic Name 53
CL13 - Clinic Name 54
CL14 - Clinic Name 55
Save
Cancel

9. Click **Save**. The status message displays indicating that the outreach organization was saved successfully. The screen refreshes and returns to the **Maintain Outreach Organizations** screen.

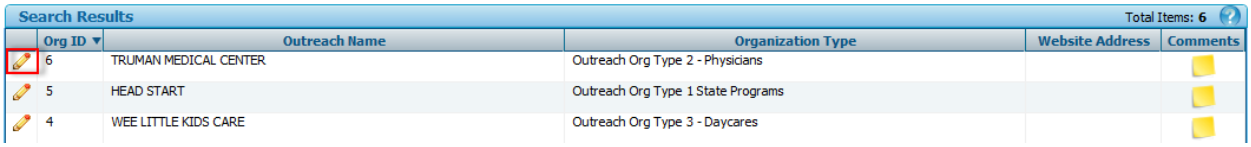
Task B. Searching and Editing an Outreach Organization

Complete the following steps to perform this task:

1. From the **Maintain Outreach Organizations** screen, enter one or more search options:
   - Enter the **Organization ID**.
   - Select the **Outreach Organization Type**.
   - Enter the **Outreach Organization Name**.
   - Select the **State**.
   - Select **Local Agencies**.
   - Select **Clinics**.



   - Click **Search**. The screen refreshes and the new outreach organization displays on the **Search Results** grid.



2. Click on the **Edit** button ( ). The **Maintain Outreach Organizations** screen displays. Make the changes to the screen.
3. Click **Save**. The screen is updated.

Congratulations!

You have successfully completed the **Maintain Outreach Organizations** process.

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7- MAINTAIN OUTREACH CAMPAIGNS

Maintain Outreach Campaigns

A campaign consists of one or more activities. Each activity can be associated with one or more outreach organizations, sites or individuals. Individual activities can be targeted for a geographic area, local agency or clinic by associating it with an outreach organization, which is associated with that area, local agency or clinic. This scenario explains the process of capturing information on outreach campaigns for a clinic, local agency or state. This system process also provides data to help evaluate the success of the campaign, such as the cost benefit of the campaign. Between the start and fall off date, the campaign name is an option in the **How did you hear about WIC** drop down list. And, that count is what drives the cost benefit data.

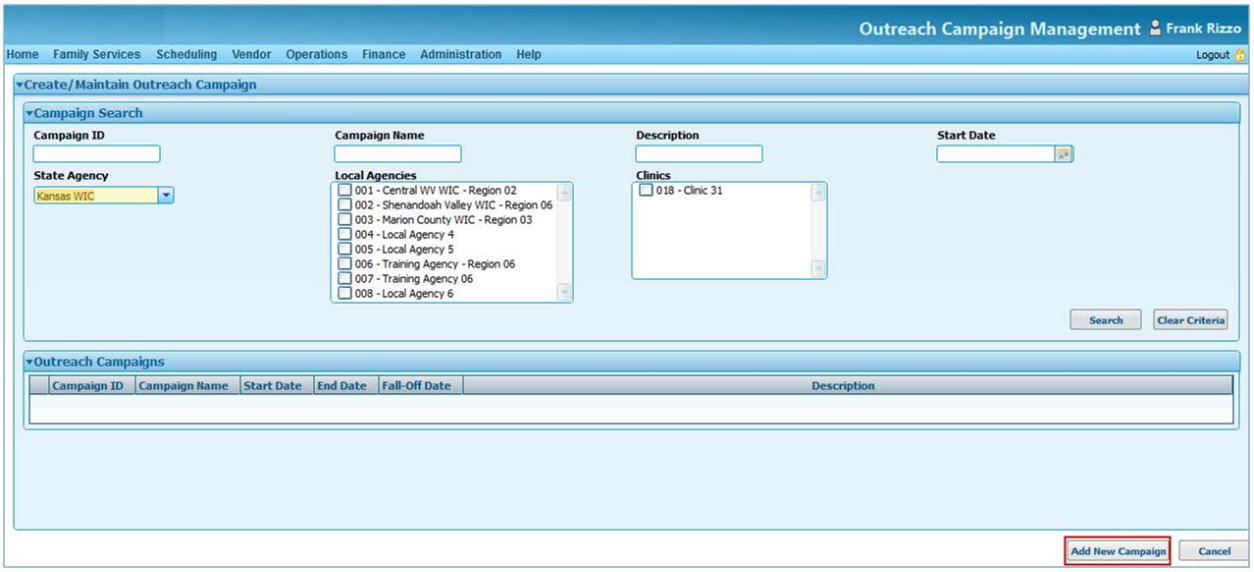
This process includes the following tasks:

Task A. Adding a New Outreach Campaign 7-2
Task B. Searching and Editing an Outreach Campaign 7-4

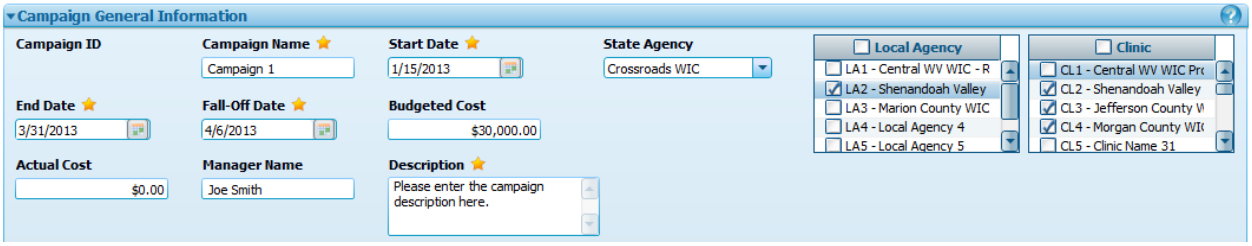
Task A. Adding a New Outreach Campaign

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → Maintain Outreach Campaign**. The **Outreach Campaign Management** screen displays.



2. Click **Add New Campaign**. The **Outreach Campaign Detail** screen displays.
3. Under **Campaign General Information** complete the following:
   - Enter the **Campaign Name**.
   - Select the **Start Date**.
   - Select the **State Agency**.
   - Check the boxes for one or more **Local Agencies**.
   - Select the **End Date**
   - Select the **Fall-Off Date** (The date when the campaign will no longer show as an option in the How did you hear about WIC? Dropdown)
   - Enter the **Budgeted Cost**.
   - Enter the **Actual Cost**.
   - Enter the **Manager Name**.
   - Enter the **Description**.

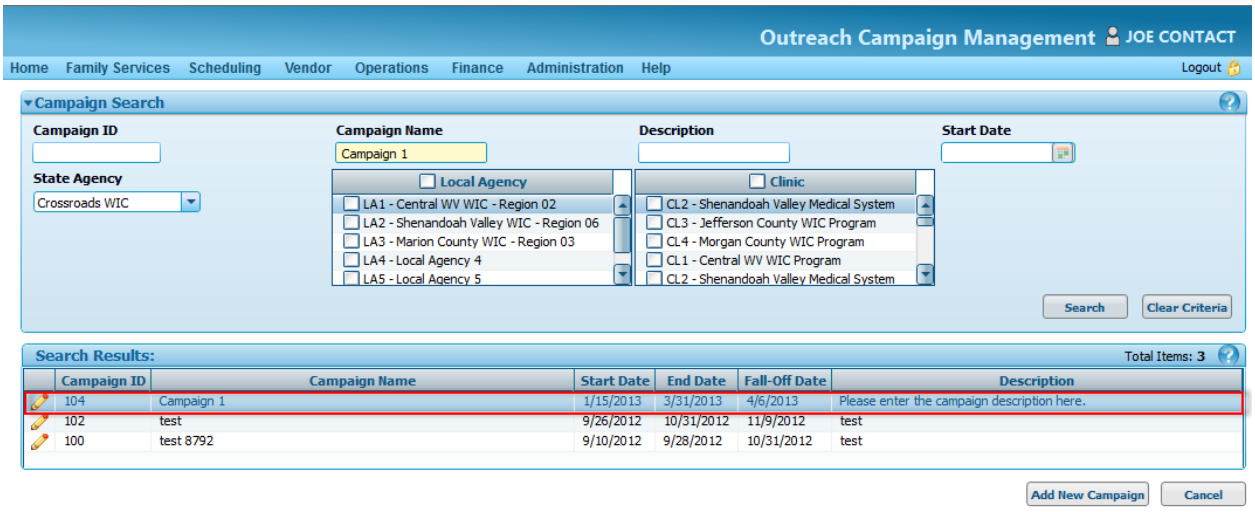


4. Click **Save**. The screen refreshes and returns to the **Outreach Campaign Management** screen.

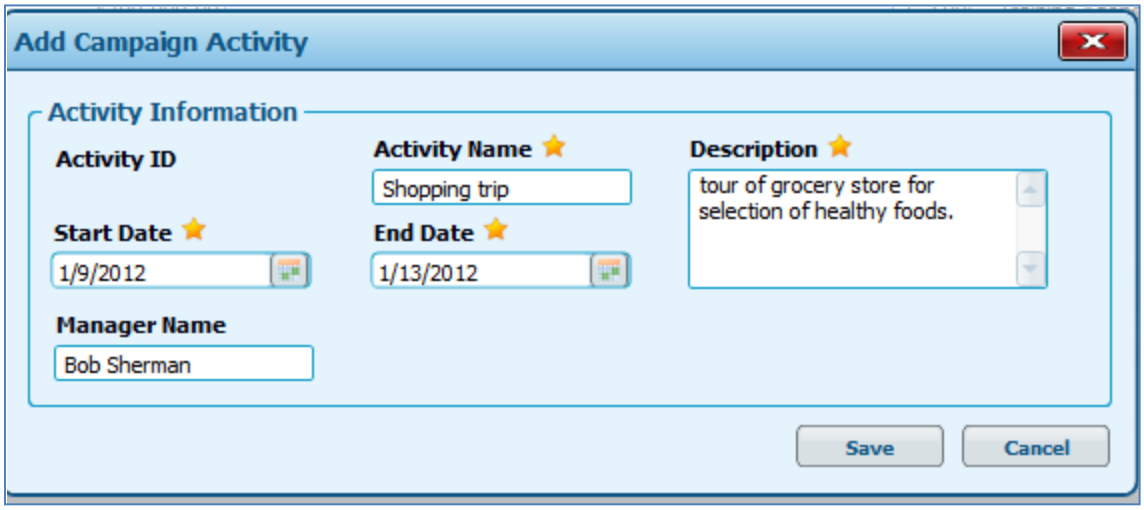
Task B. Searching and Editing an Outreach Campaign

Complete the following steps to perform this task:

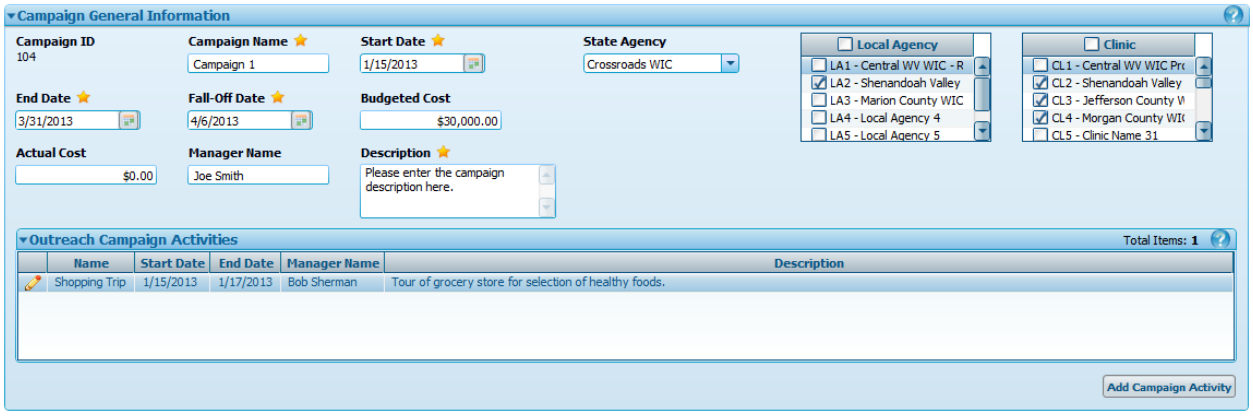
1. From the **Outreach Campaign Management** screen, under **Campaign Search**, enter one or more of the following search options:
   - **Campaign ID**
   - **Campaign Name**
   - **Description**
   - **Start Date**
   - **State Agency**
   - **Local Agency**
   - **Clinic**
2. Click **Search**. The screen refreshes and the new campaign displays on the **Outreach Campaign** grid.



3. Click the **Edit** button ( ). The **Outreach Campaign Detail** screen displays.
4. Click **Add Campaign Activity**. The **Add Campaign Activity** screen displays.
5. Under **Activity Information**, enter the following:
   - Enter the **Activity Name**.
   - Select the **Description**.
   - Enter the **Start Date**.
   - Enter the **End Date**.
   - Enter the **Manager Name** (optional).



6. Click **Save**. The status message displays indicating the campaign activity has been added successfully. The screen refreshes and the new activity displays on the **Campaign Activity** grid.



Congratulations!

You have successfully completed the **Maintain Outreach Campaigns** process.

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8- MAINTAIN CASE FILES

Maintain Case Files

This scenario explains the process of searching for case files, creating a case file (including recording an investigation, recording a sanction, recording an appeal, recording a fair hearing), editing a case file, and closing a case file. Case files can be created for families/participants or WIC staff.

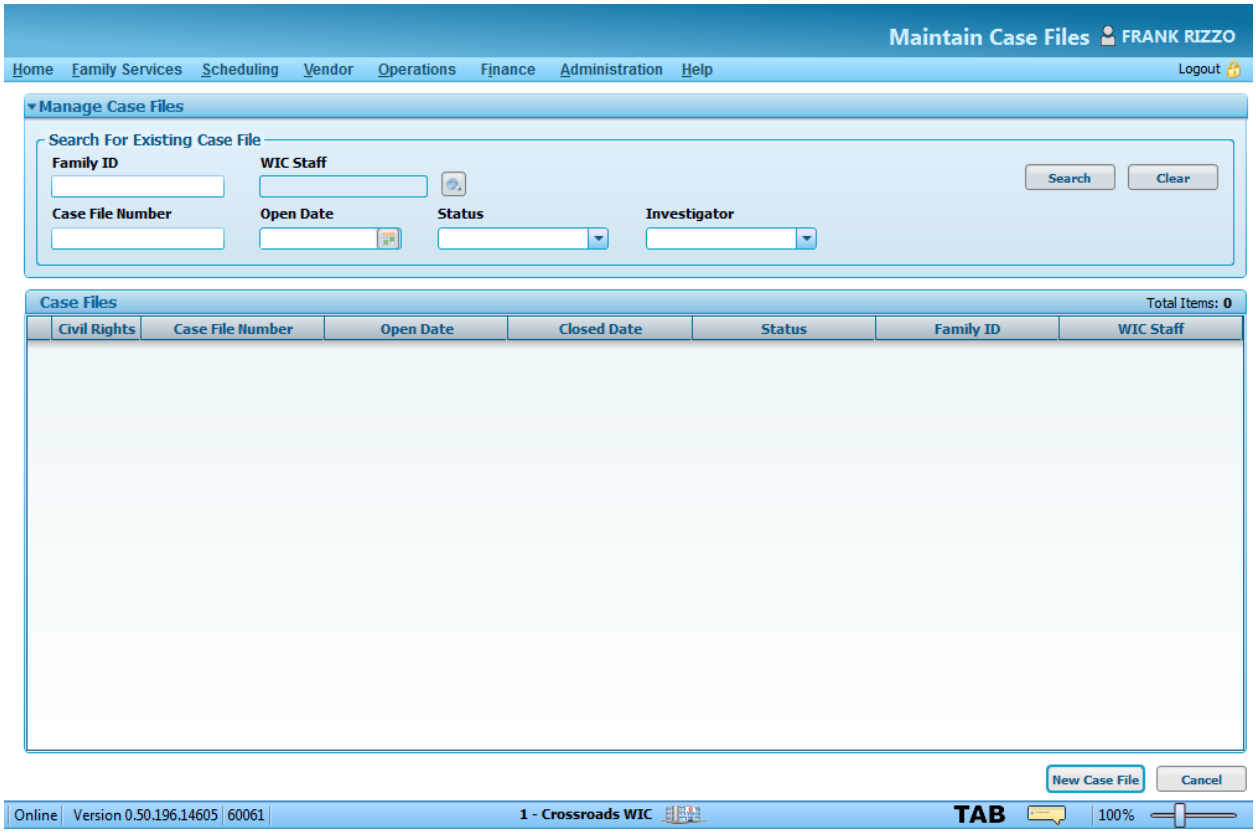
This process includes the following tasks:

Task A. Searching for an Existing Case File..... 8-2
Task B. Creating a New Case File..... 8-3
Task C. Recording Investigations 8-7
Task D. Recording Sanctions 8-9
Task E. Recording Appeals..... 8-12
Task F. Recording Hearings 8-16
Task G. Editing an Existing Case File 8-19
Task H. Closing a Case File 8-21

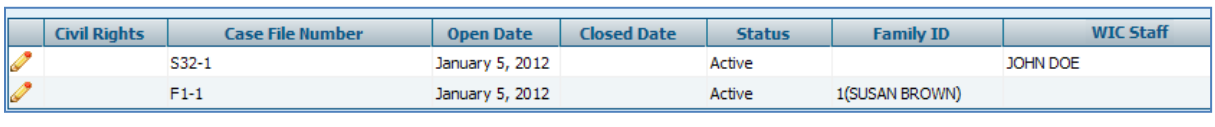
Task A. Searching for an Existing Case File

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → Maintain Case Files**. The **Maintain Case Files** screen displays.



2. Under **Manage Case Files**, complete one or more of the following:
   - Enter a **Family ID** number.
   - Select a **WIC Staff**.
   - Enter a **Case File Number**.
   - Enter or select an **Open Date**.
   - Select a **Status**.
3. Select an **Investigator**. Click **Search**. The grid displays the results of the search.

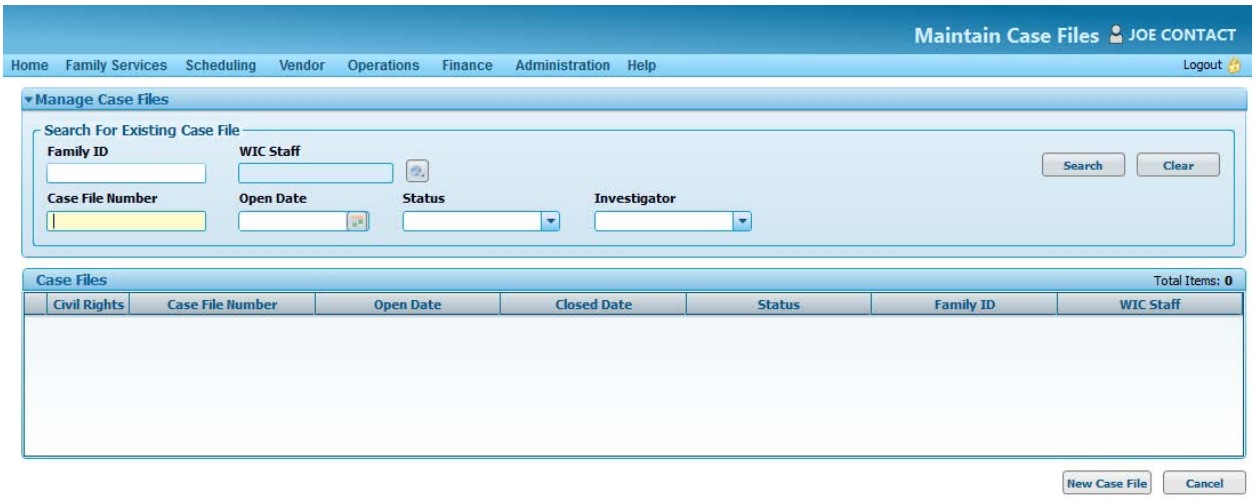


	Civil Rights	Case File Number	Open Date	Closed Date	Status	Family ID	WIC Staff
		S32-1	January 5, 2012		Active		JOHN DOE
		F1-1	January 5, 2012		Active	1(SUSAN BROWN)	

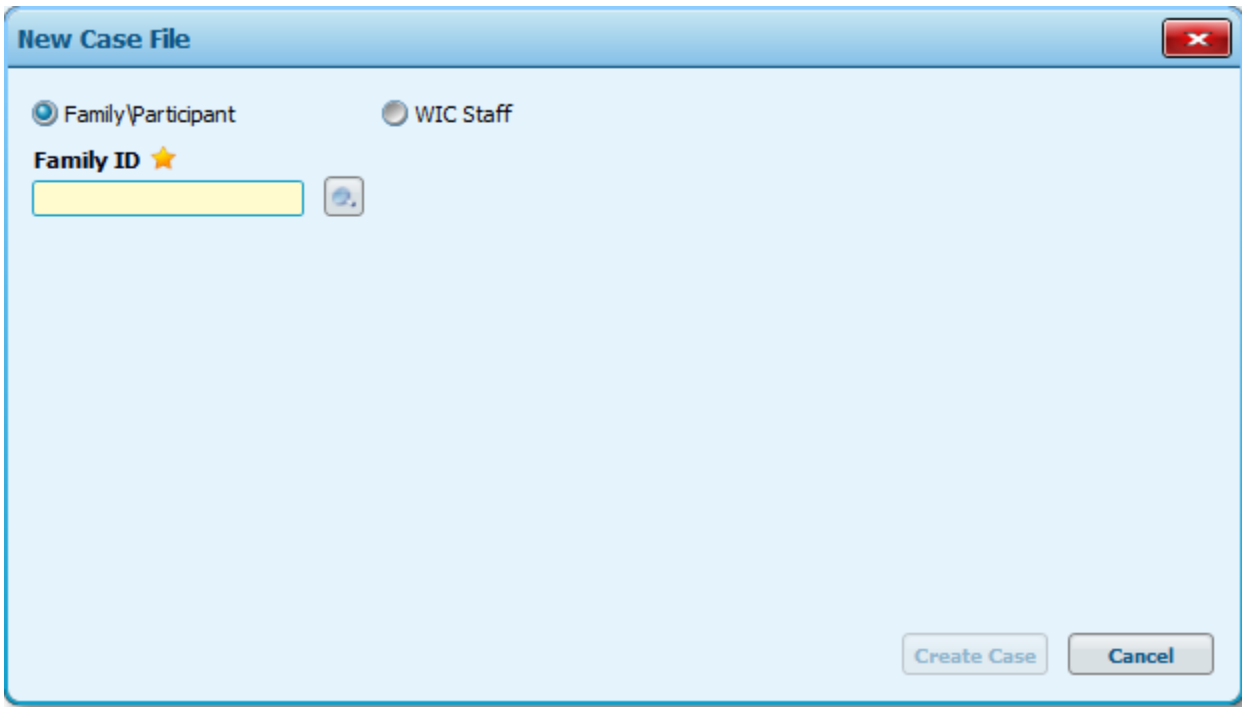
Task B. Creating a New Case File

Complete the following steps to perform this task:

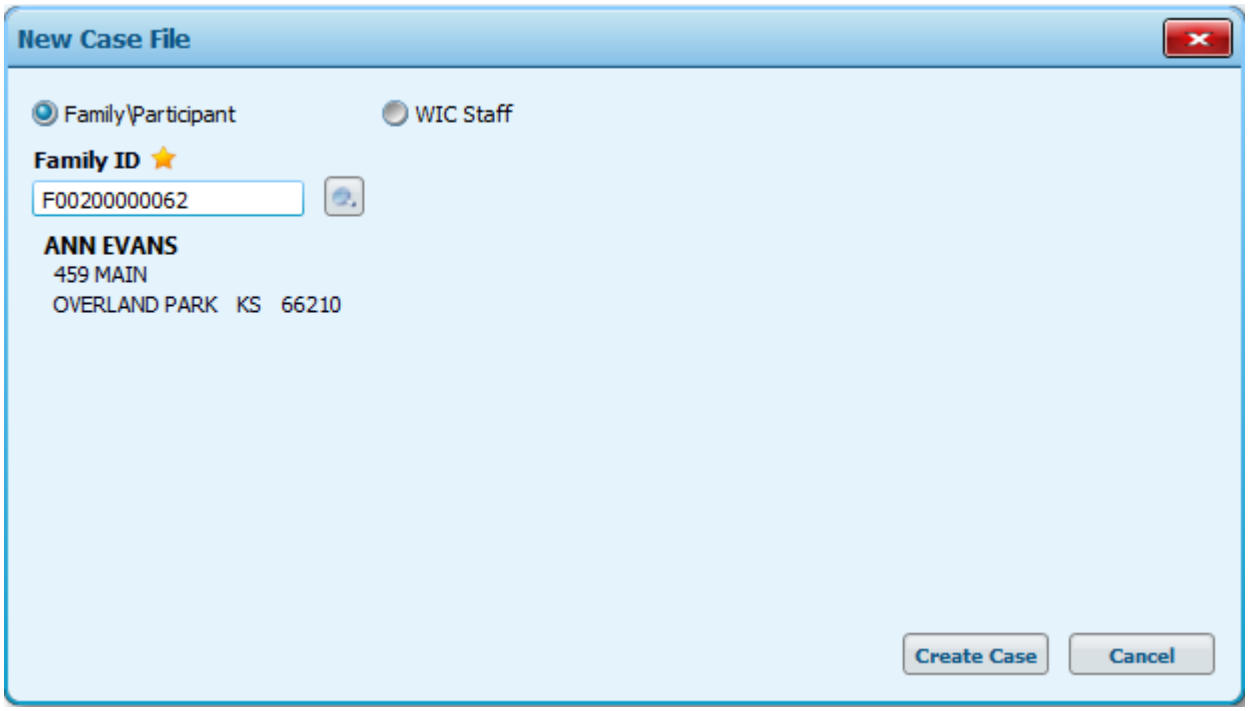
1. From the **Home** screen, go to **Operations → Maintain Case Files**. The **Maintain Case Files** screen displays.



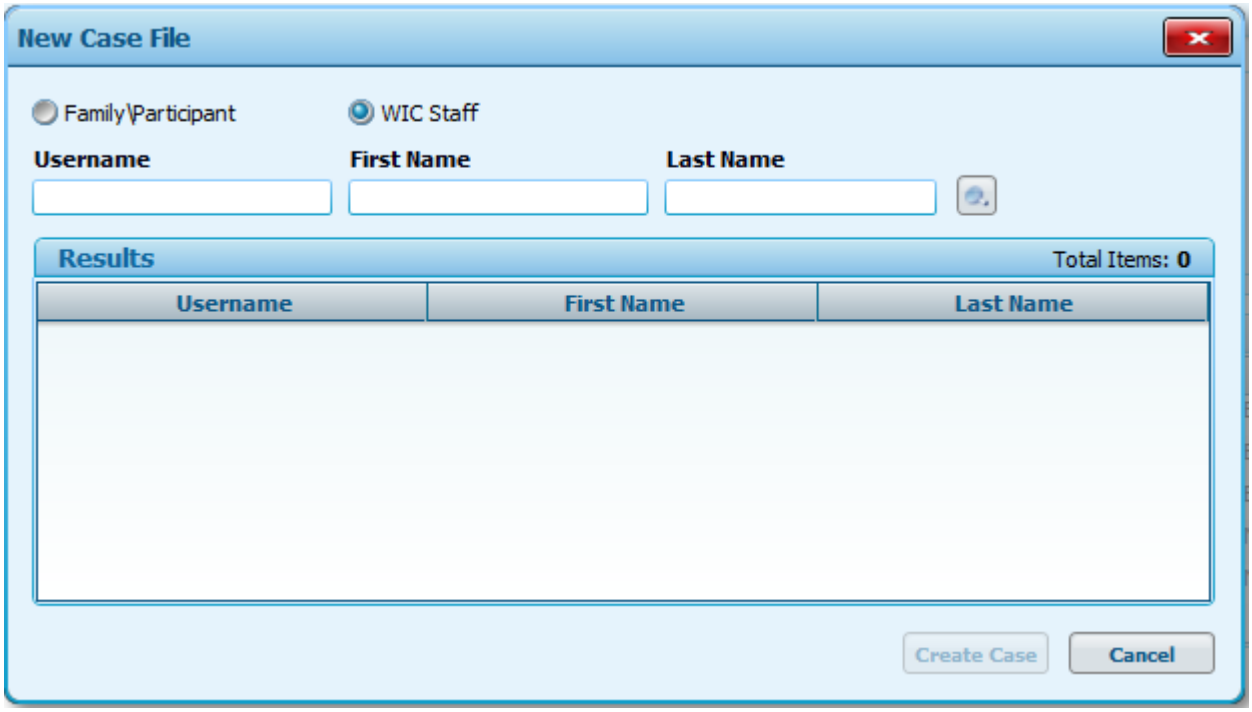
2. Click **New Case File**. The **New Case File** screen displays.



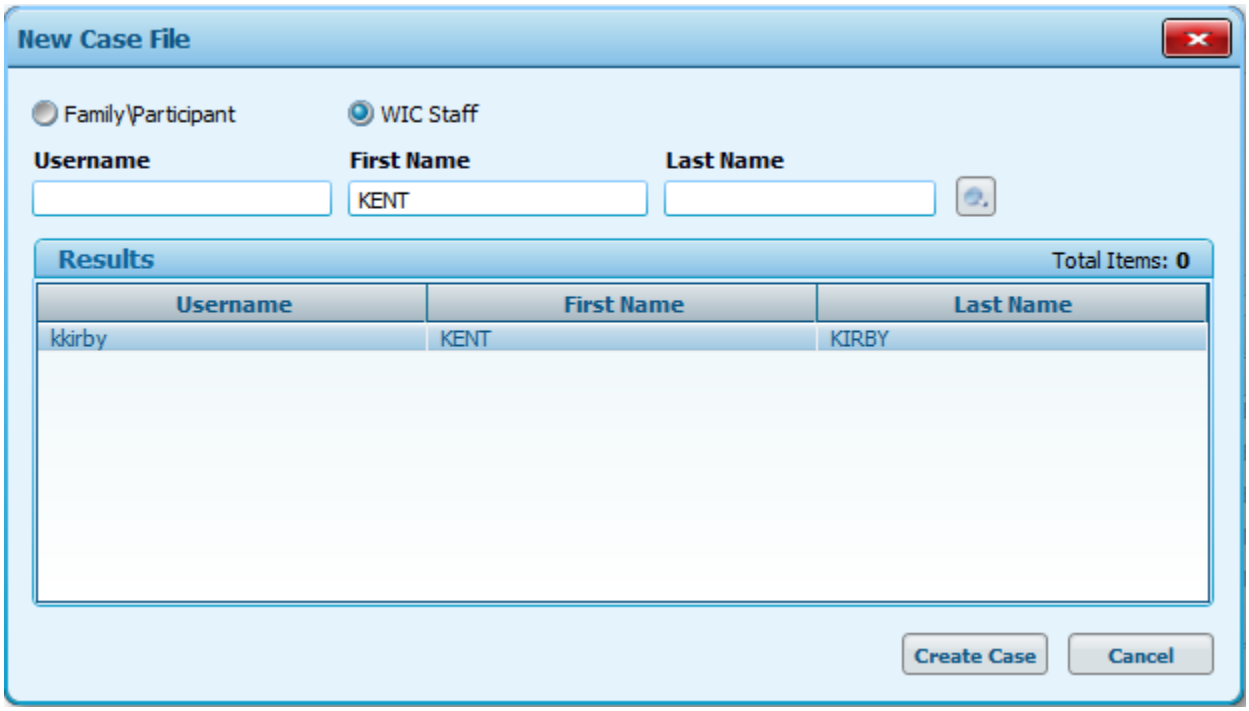
3. Select one of the following:
   - **Family/Participant**
   - **WIC Staff**
4. Do one of the following:
   - If **Family/Participant** is selected, then:
     - Enter a **Family ID** number.
     - Click the **Lookup Family** button ( ). The screen refreshes and displays family related information.



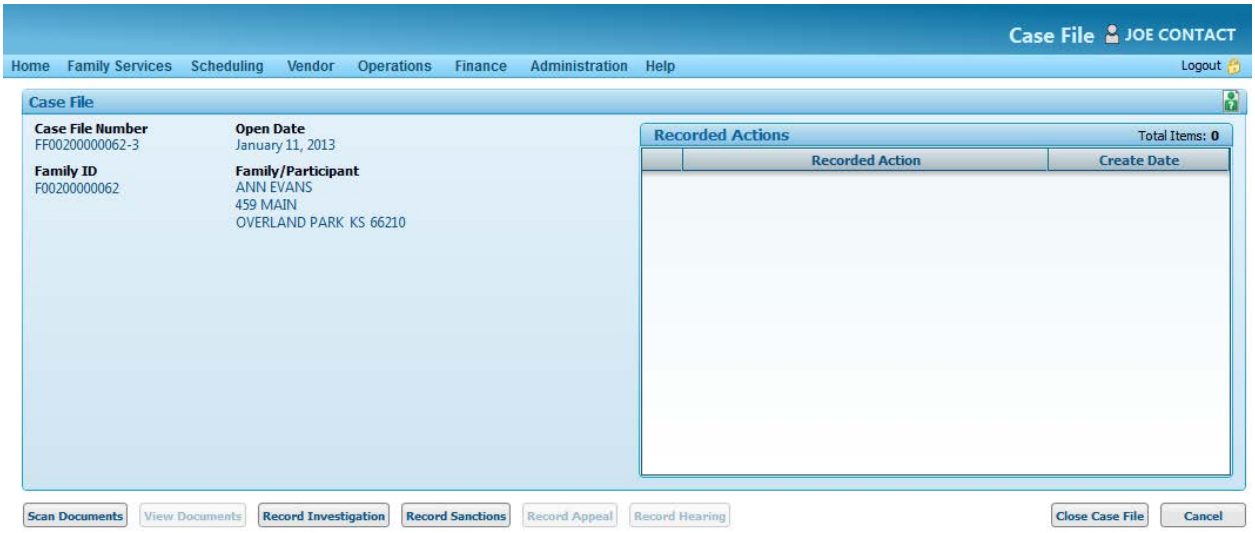
5. If **WIC Staff** is selected, then enter one or more of the following:



- Enter a **Username**.
- Enter a **First Name**.
- Enter a **Last Name**.
- Click the **Lookup** button ( ). The screen refreshes to display staff related information.



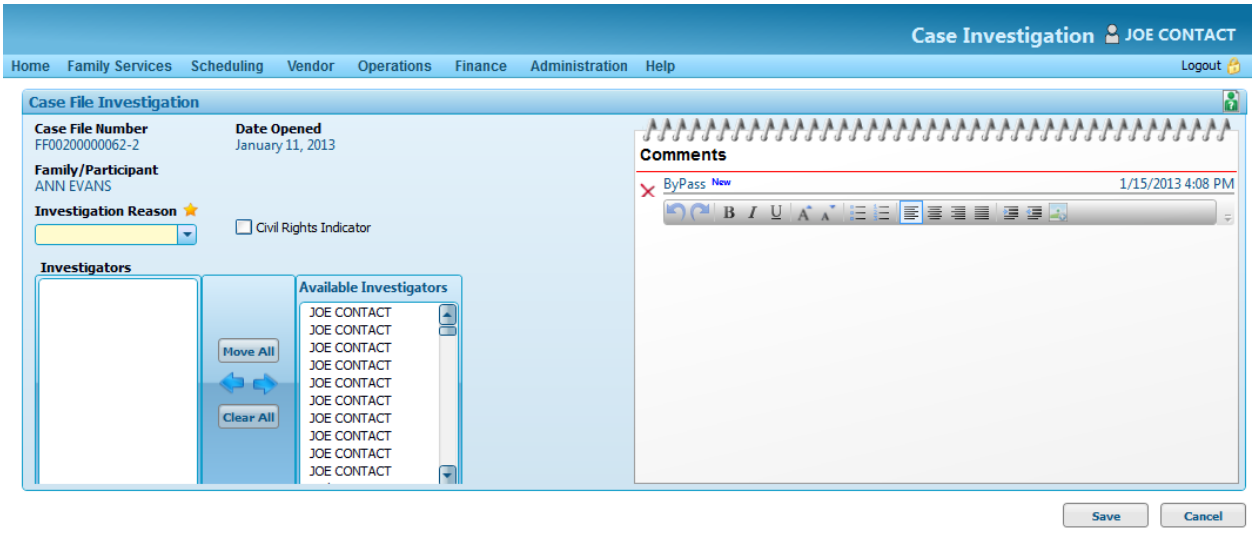
6. Click **Create Case**. A status message displays indicating success and you are navigated to the **Case File** screen.



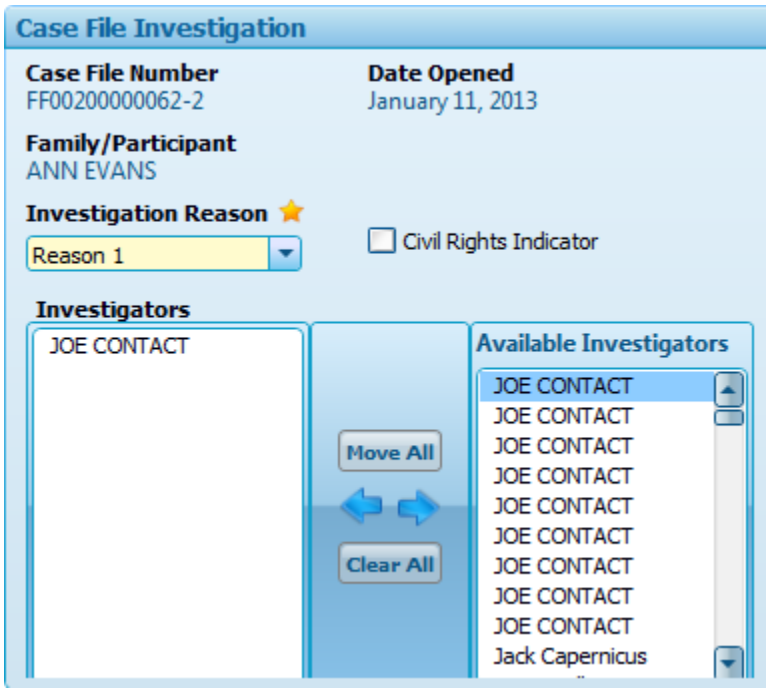
Task C. Recording Investigations

Complete the following steps to perform this task:

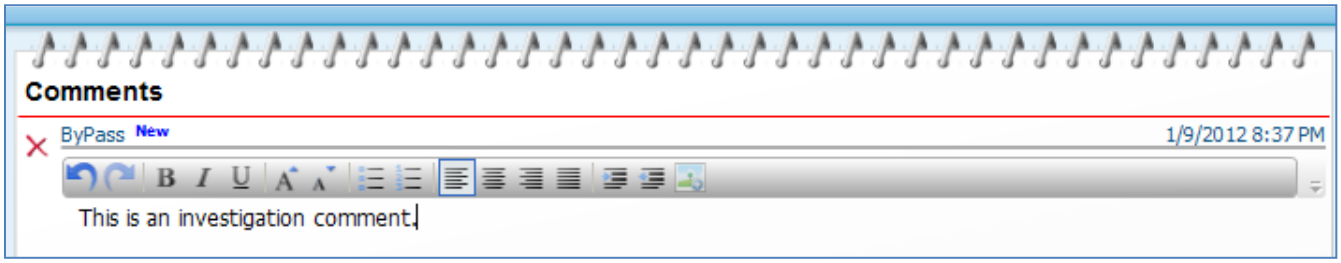
1. With a **Case File** open, click **Record Investigation**. The **Case Investigation** screen displays.



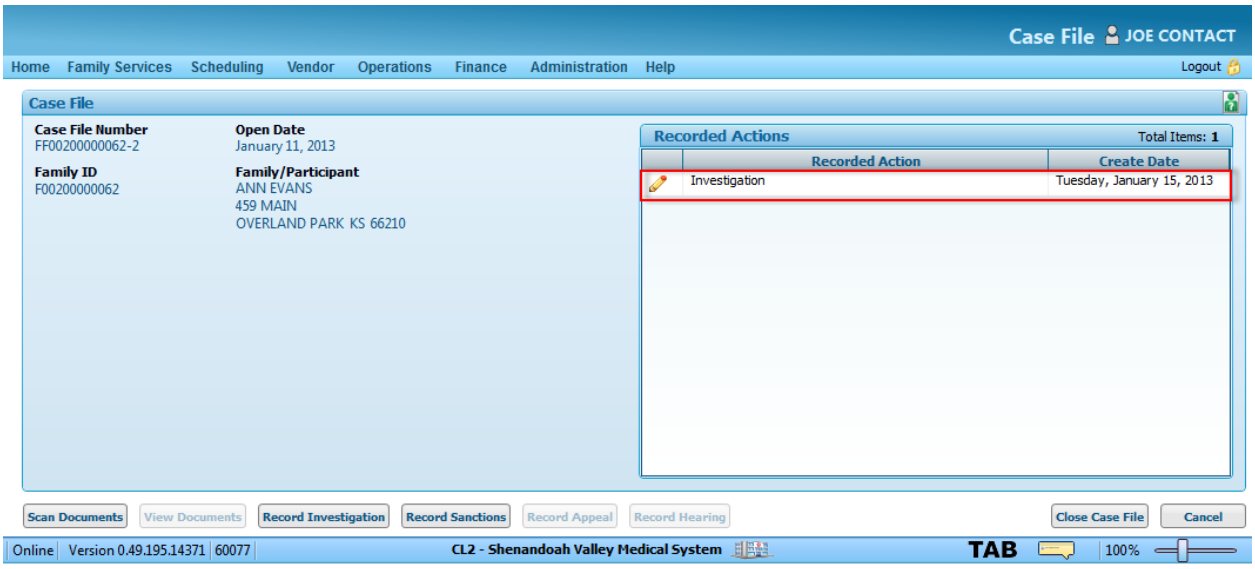
2. Select an **Investigation Reason**.
3. Check **Civil Rights Indicator**, if necessary.
4. Select an **Investigator** from the **Available Investigators** slider list box.



5. Enter **Comments**, if necessary.



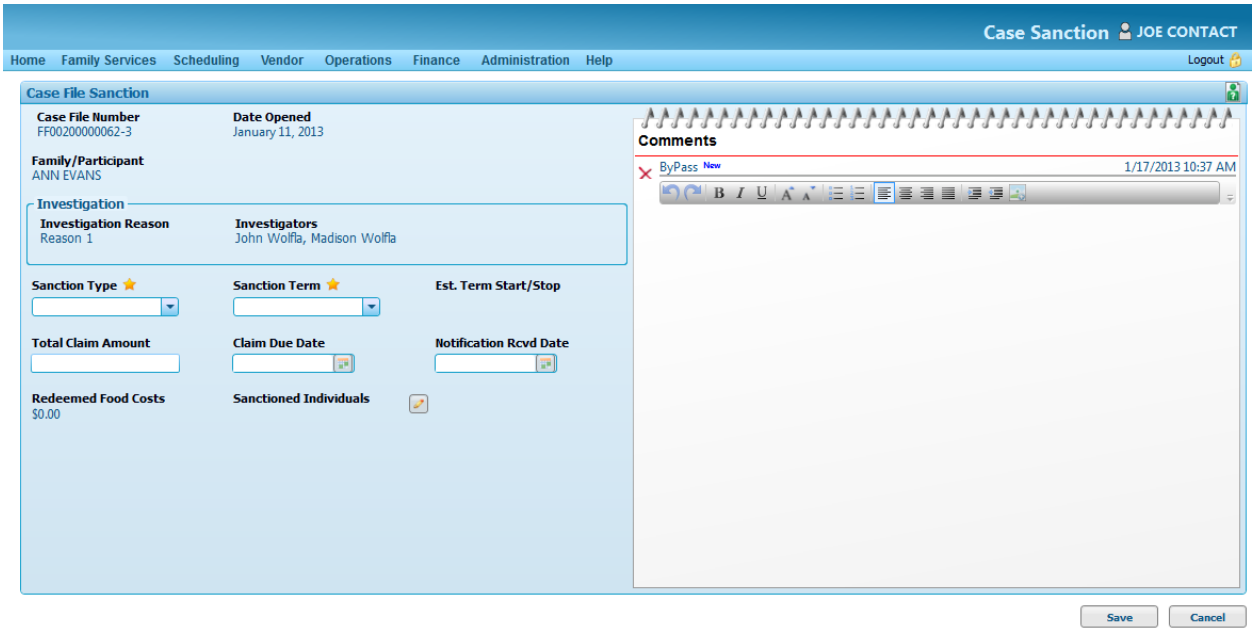
6. Click **Save**. A status message displays indicating success and you are returned to the **Case File** screen.



Task D. Recording Sanctions

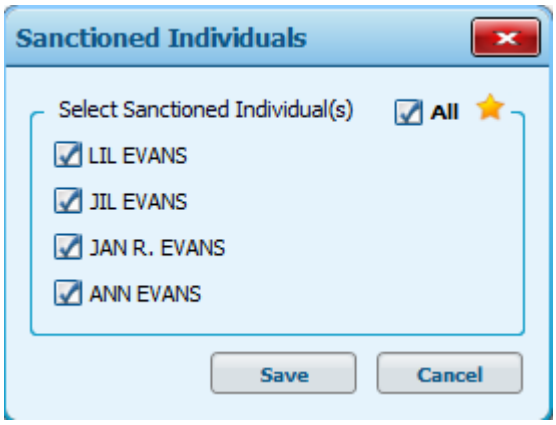
Complete the following steps to perform this task:

1. With a **Case File** open, click **Record Sanctions**. The **Case Sanction** screen displays.

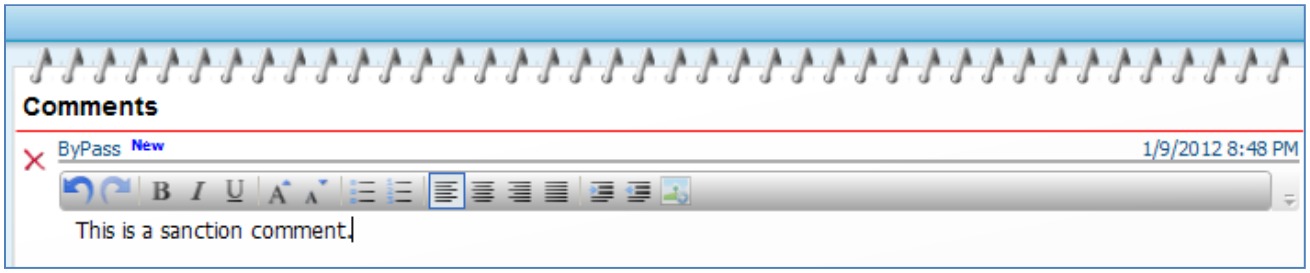


2. Select a **Sanction Type**.
3. Select a **Sanction Term**.
4. Enter a **Total Claim Amount**.
5. Enter or select a **Claim Due Date**.
6. Enter or select a **Notification Rcvd Date**.

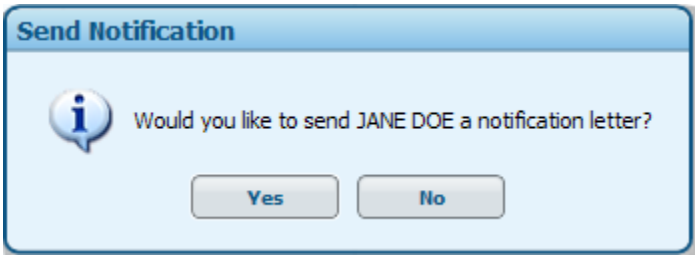
7. Click the **Sanctioned Individuals Lookup** button ( ). The **Sanctioned Individuals** screen displays. Select any individuals that should be sanctioned and click **Save**.



8. Enter sanction **Comments**, if necessary.



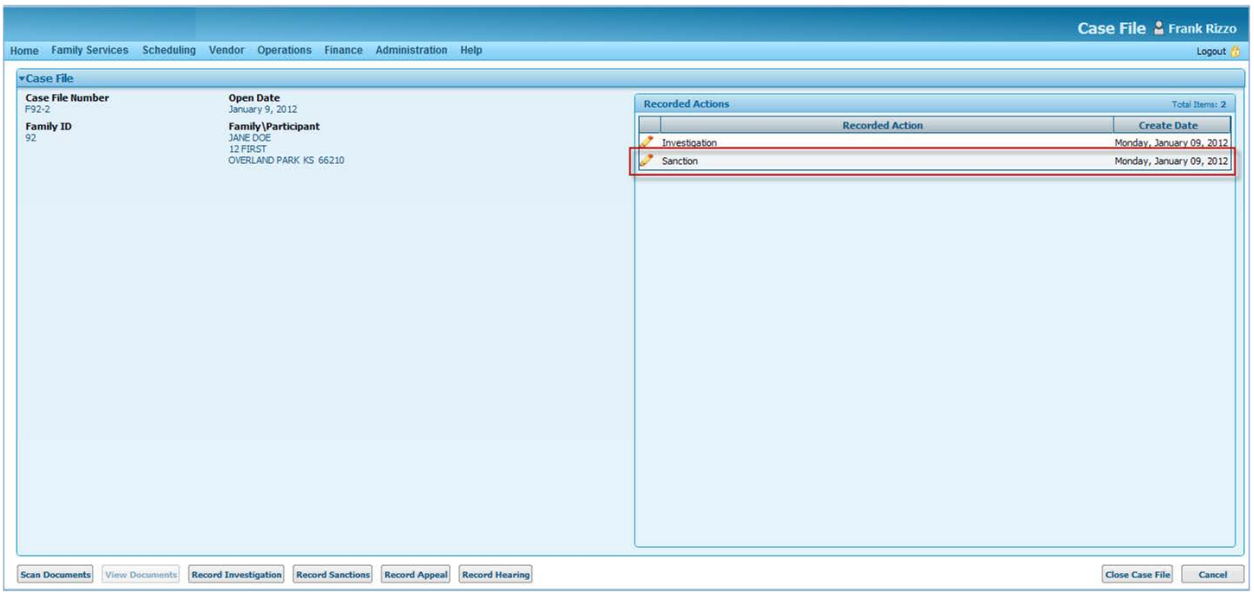
9. Click **Save**. A status message displays indicating success and you are prompted to send a notification letter.



10. Do one of the following:

- Click **Yes** to send a notification letter. You are returned to the **Case File** screen.
- Click **No** to bypass the notification letter process. You are returned to the **Case File** screen.

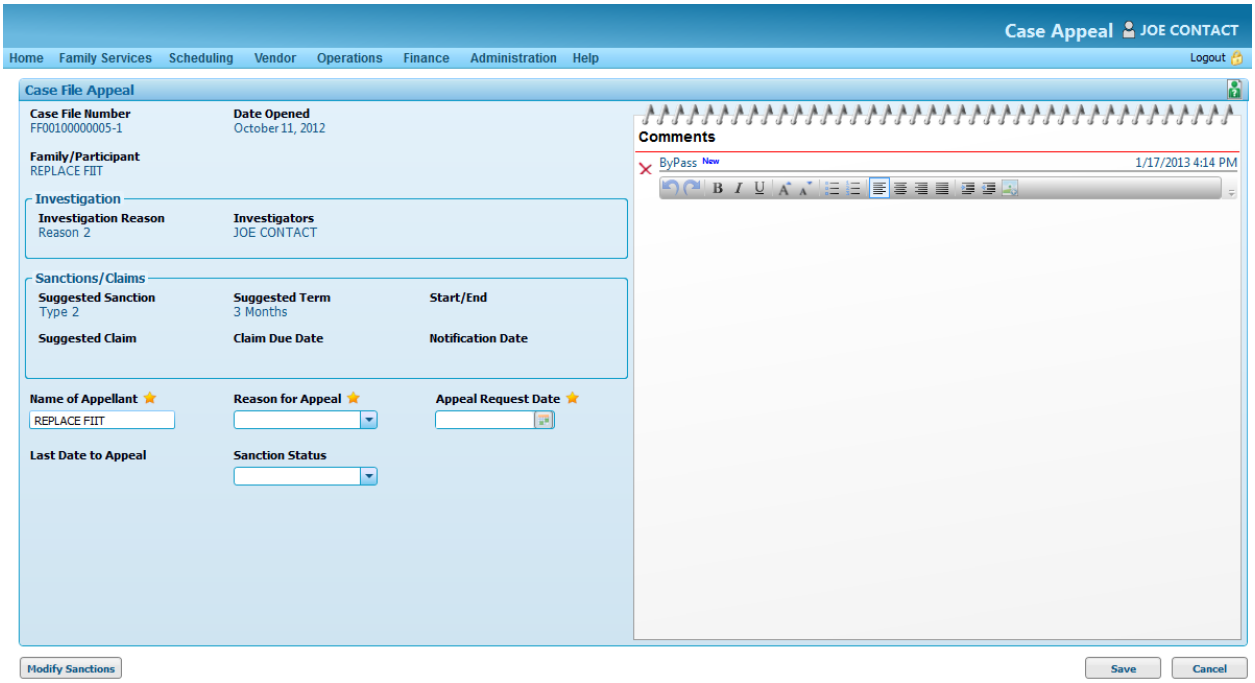
The Notifications screen can be used to e-mail or print notifications as needed. Refer to the Notifications scenario on page 5-1 for details.



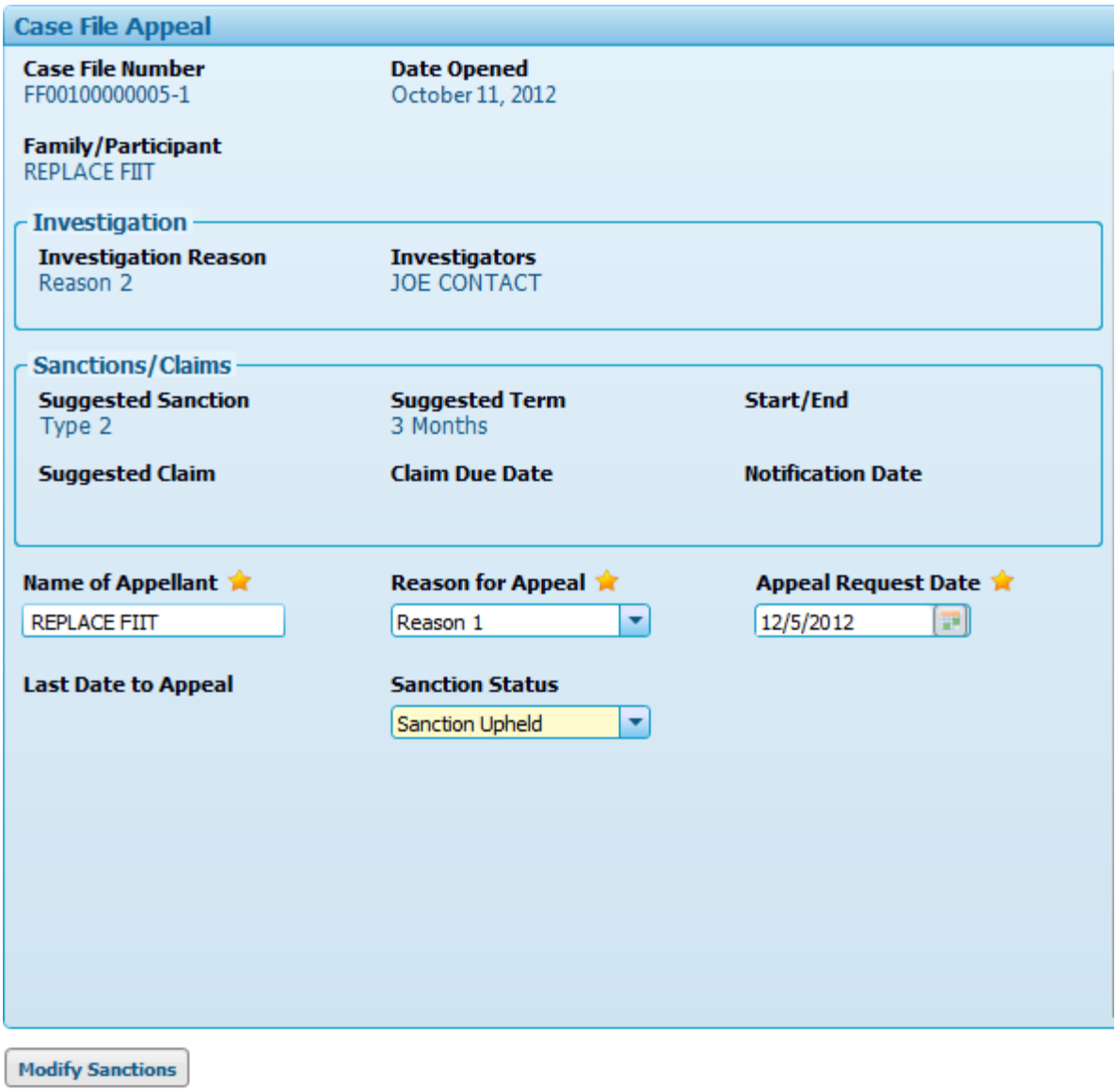
Task E. Recording Appeals

Complete the following steps to perform this task:

1. With a **Case File** open, click **Record Appeal**. The **Case Appeal** screen displays.



2. Update the **Name of Appellant**.
3. Select a **Reason for Appeal**.
4. Enter or select a **Date of Appeal**.
5. Select a **Sanction Status**.



The Date of Appeal must be greater than the Notification Date.

The Date of Appeal must be greater than the Claim Due Date.

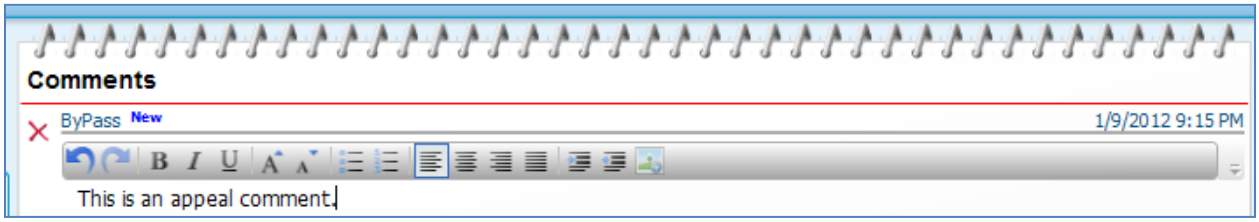
6. Click **Modify Sanctions** to modify the previously entered sanction information. The screen refreshes and displays the sanction information in an editable form.

Note that if you click Modify Sanctions and navigate away from the Case Appeal screen, any changes you made to the appeal information will not be saved.

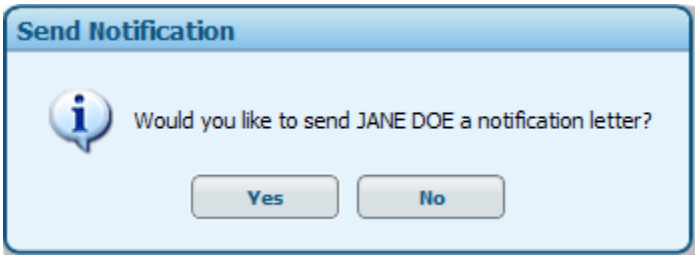
The Modify Sanctions button should be used only if you are reviewing a Case Appeal that has already been saved and to which no changes have been made.

7. Update the sanction information as necessary.

8. Enter appeal **Comments**, if necessary.



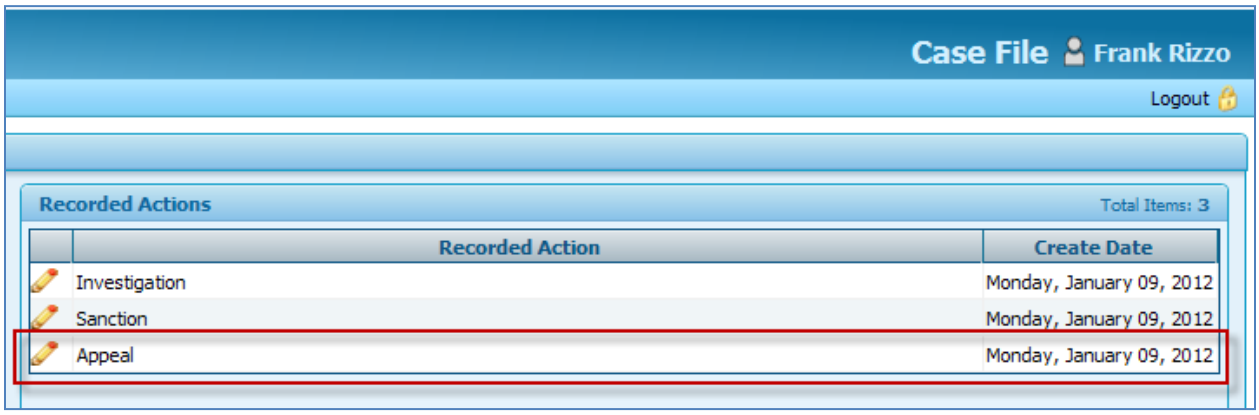
9. Click **Save**. A status message displays indicating success and you are prompted to send a notification letter.



10. Do one of the following:

- Click **Yes** to send a notification letter. You are returned to the **Case File** screen.
- Click **No** to bypass the notification letter process. You are returned to the **Case File** screen.

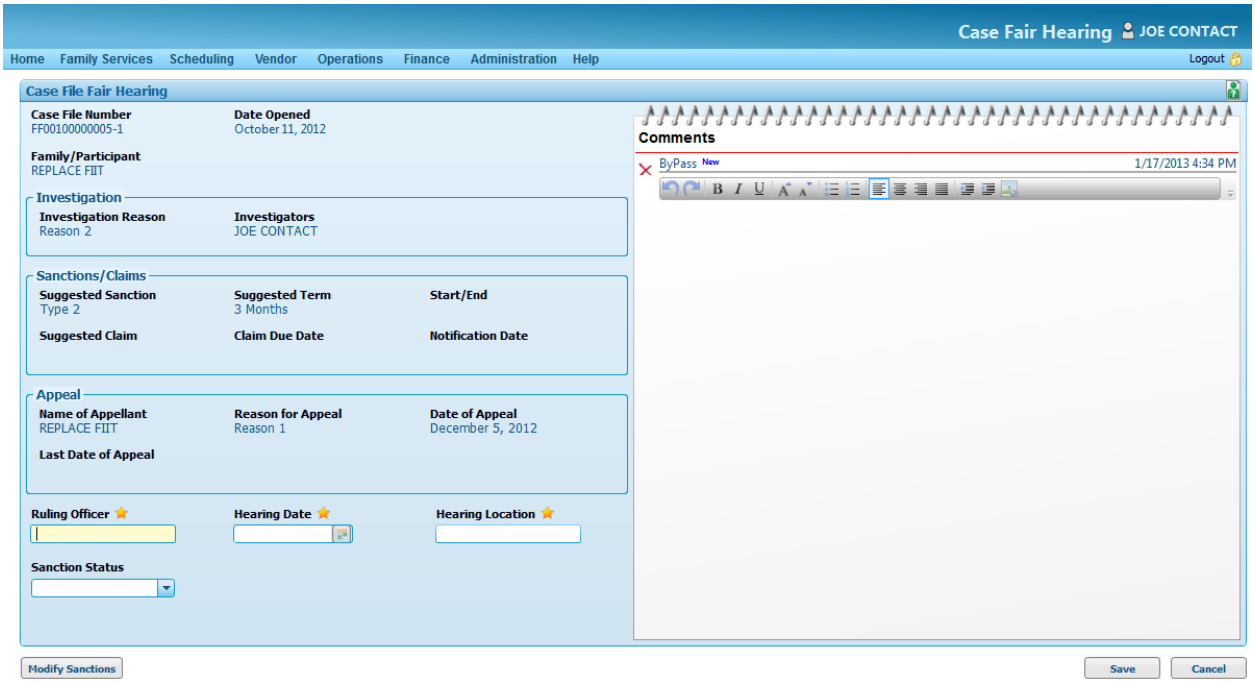
The Notifications screen can be used to e-mail or print notifications as needed. Refer to the Notifications scenario on page 5-1 for details.



Task F. Recording Hearings

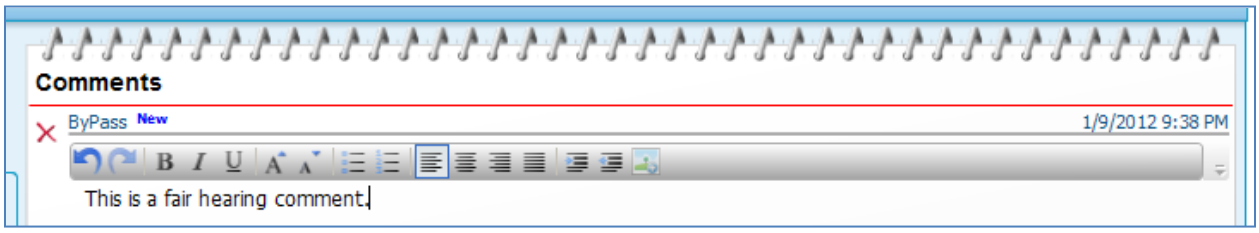
Complete the following steps to perform this task:

1. With a **Case File** open, click **Record Hearing**. The **Case Fair Hearing** screen displays.

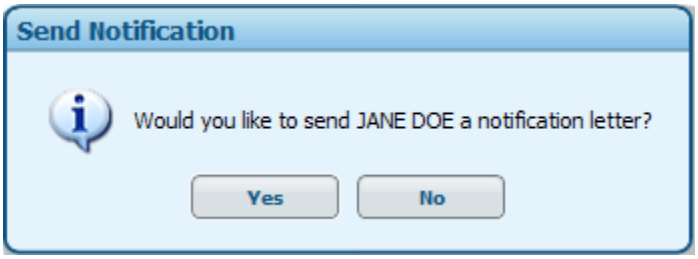


2. Enter the **Ruling Officer**.
3. Enter or select a **Hearing Date**.
4. Enter a **Hearing Location**.
5. Select a **Sanction Status**.

6. Enter appeal **Comments**, if necessary.

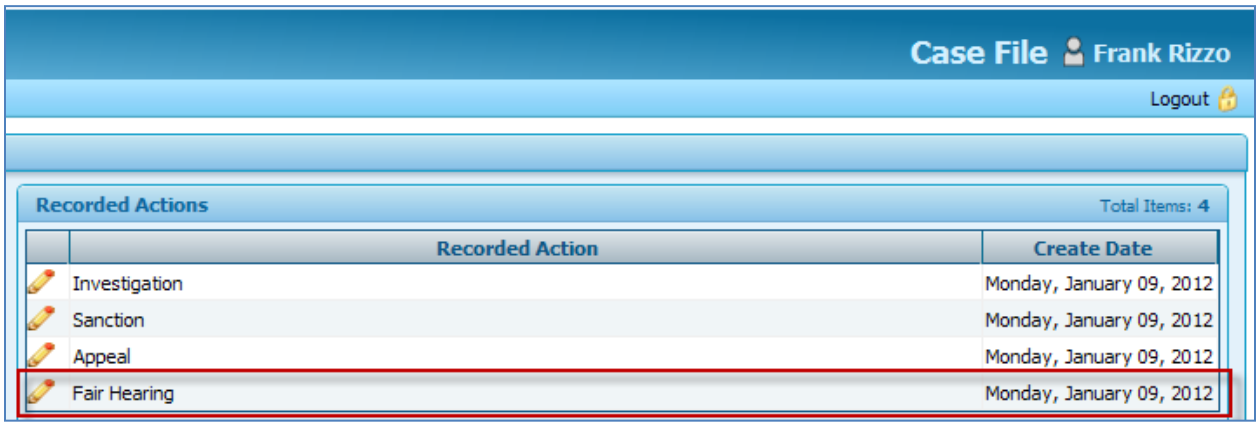


7. Click **Save**. A status message displays indicating success and you are prompted to send a notification letter.



8. Do one of the following:
   - Click **Yes** to send a notification letter. You are returned to the **Case File** screen.
   - Click **No** to bypass the notification letter process. You are returned to the **Case File** screen.

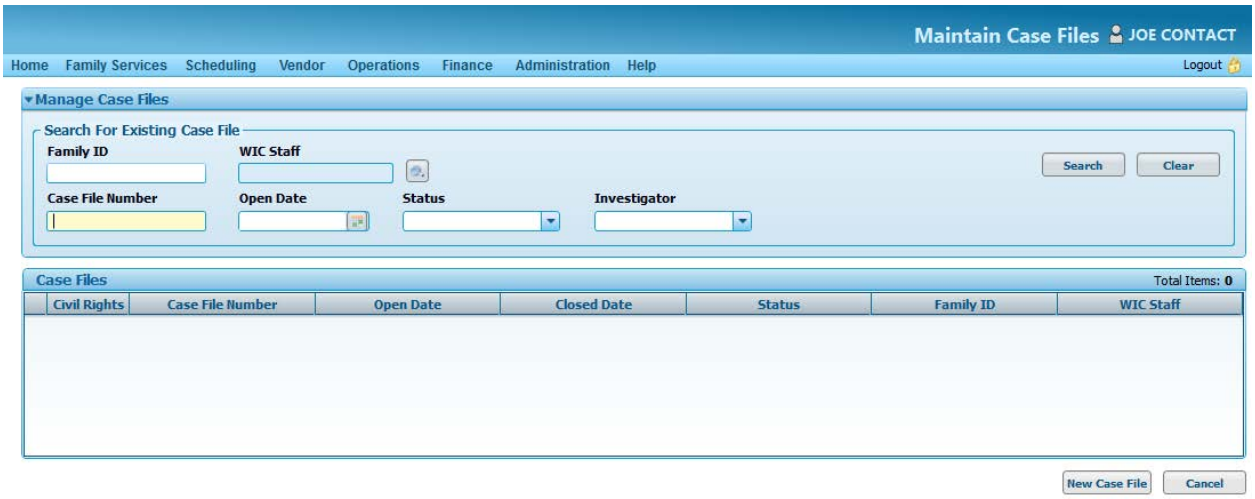
The Notifications screen can be used to e-mail or print notifications as needed. Refer to the Notifications scenario on page 5-1 for details.



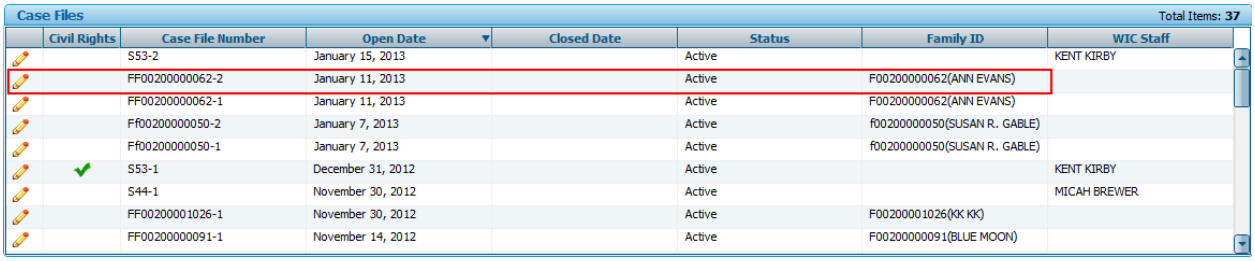
Task G. Editing an Existing Case File

Complete the following steps to perform this task:

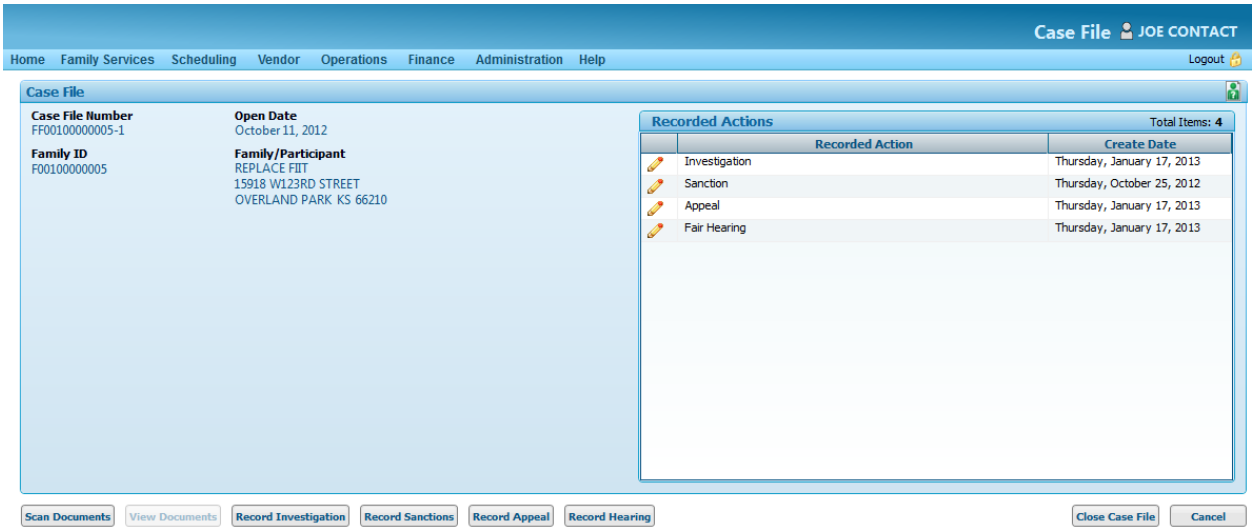
1. From the **Home** screen, go to **Operations → Maintain Case Files**. The **Maintain Case Files** screen displays.



2. Enter or select search criteria. Click **Search**. The grid displays the results of the search.


Case Files
Total Items: 37
Civil Rights
Case File Number
Open Date
Closed Date
Status
Family ID
WIC Staff
S53-2 January 15, 2013 Active KENT KIRBY
FF00200000062-2 January 11, 2013 Active F00200000062(ANN EVANS)
FF00200000062-1 January 11, 2013 Active F00200000062(ANN EVANS)
Ff00200000050-2 January 7, 2013 Active f00200000050(SUSAN R. GABLE)
Ff00200000050-1 January 7, 2013 Active f00200000050(SUSAN R. GABLE)
S53-1 December 31, 2012 Active KENT KIRBY
S44-1 November 30, 2012 Active MICAH BREWER
FF00200001026-1 November 30, 2012 Active F00200001026(KK KK)
FF00200000091-1 November 14, 2012 Active F00200000091(BLUE MOON)

3. Select a result in the grid and click the **Edit** icon ( ). The **Case File** screen displays.

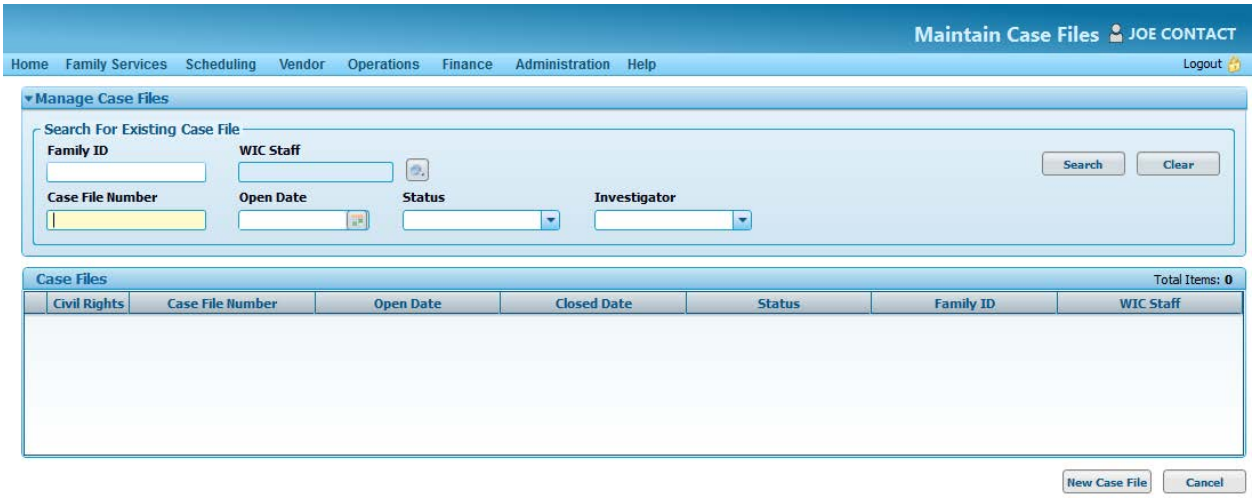


4. Within the **Recorded Actions** grid, click **Select Action** ( ) on the desired action. One of the following screens display:
    - **Case File Investigation**
    - **Case File Sanction**
    - **Case File Appeal**
    - **Case File Fair Hearing**
5. Edit the screen information as necessary.
6. Click **Save**. A status message displays indicating success and you are returned to the **Case File** screen.

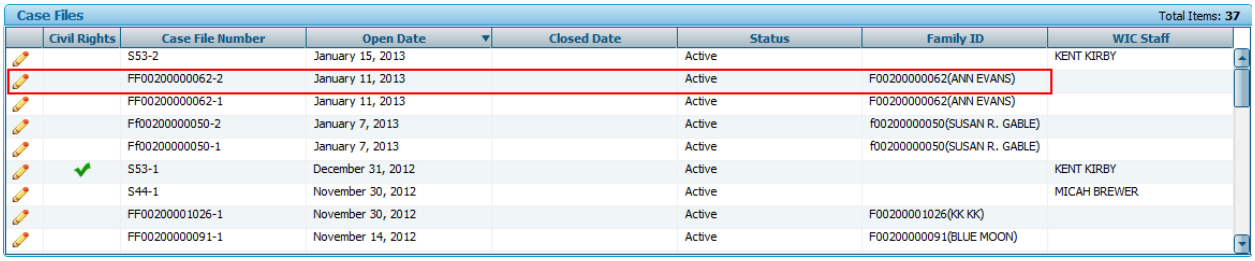
Task H. Closing a Case File

Complete the following steps to perform this task:

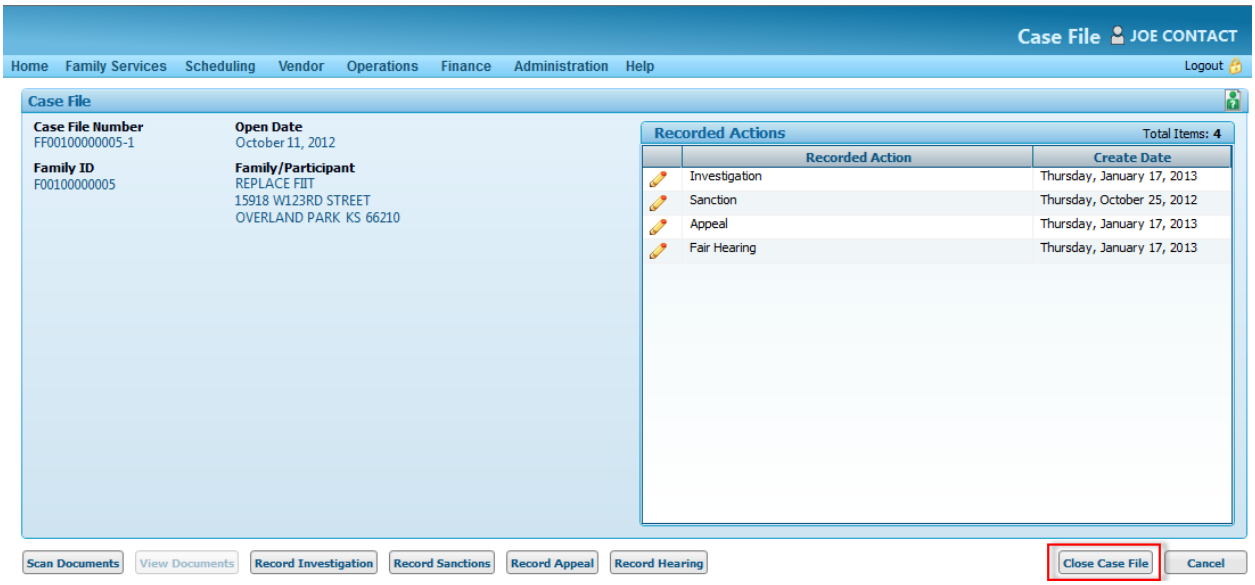
1. From the **Home** screen, go to **Operations → Maintain Case Files**. The **Maintain Case Files** screen displays.



2. Enter or select search criteria. Click **Search**. The grid displays the results of the search.


Case Files
Total Items: 37
Civil Rights
Case File Number
Open Date
Closed Date
Status
Family ID
WIC Staff
S53-2 January 15, 2013 Active KENT KIRBY
FF00200000062-2 January 11, 2013 Active F00200000062(ANN EVANS)
FF00200000062-1 January 11, 2013 Active F00200000062(ANN EVANS)
Ff00200000050-2 January 7, 2013 Active f00200000050(SUSAN R. GABLE)
Ff00200000050-1 January 7, 2013 Active f00200000050(SUSAN R. GABLE)
S53-1 December 31, 2012 Active KENT KIRBY
S44-1 November 30, 2012 Active MICAH BREWER
FF00200001026-1 November 30, 2012 Active F00200001026(KK KK)
FF00200000091-1 November 14, 2012 Active F00200000091(BLUE MOON)

3. Select a result in the grid and click **Select Case File** ( ). The **Case File** screen displays.



4. Click **Close Case File**. A status message displays indicating success and you are returned to the **Maintain Case Files** screen.

Once a case file has been closed, its information can be viewed, but can no longer be updated.

Congratulations!

You have successfully completed the **Maintain Case Files** process.

9- INVENTORY

Search Product Inventory

This scenario explains the process of adding inventory, searching for product inventory, ordering inventory, issuing inventory, disposing of inventory, and returning inventory.

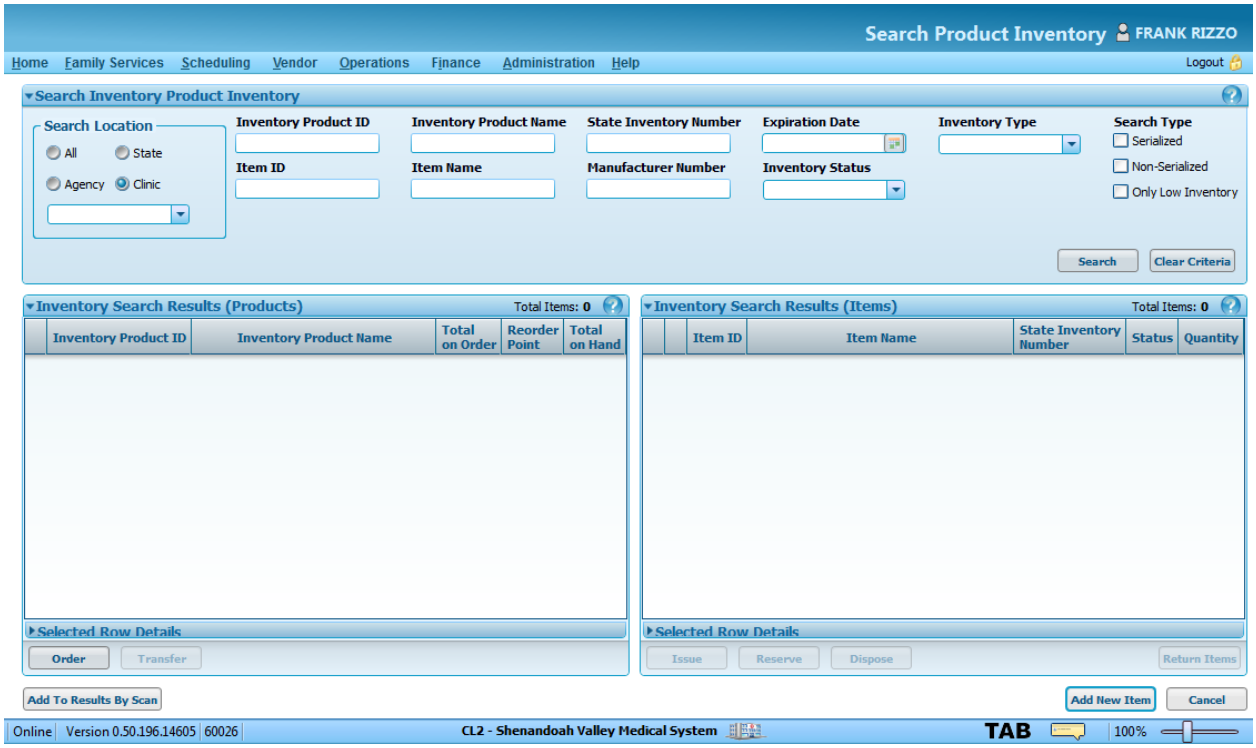
This process includes the following tasks:

Task A. Adding Inventory 9-2
Task B. Searching for Existing Inventory 9-8
Task C. Ordering Inventory 9-10
Task D. Transferring Inventory 9-16
Task E. Issuing Inventory 9-19
Task F. Reserving Inventory 9-23
Task G. Disposing of Inventory 9-27
Task H. Returning Inventory 9-30

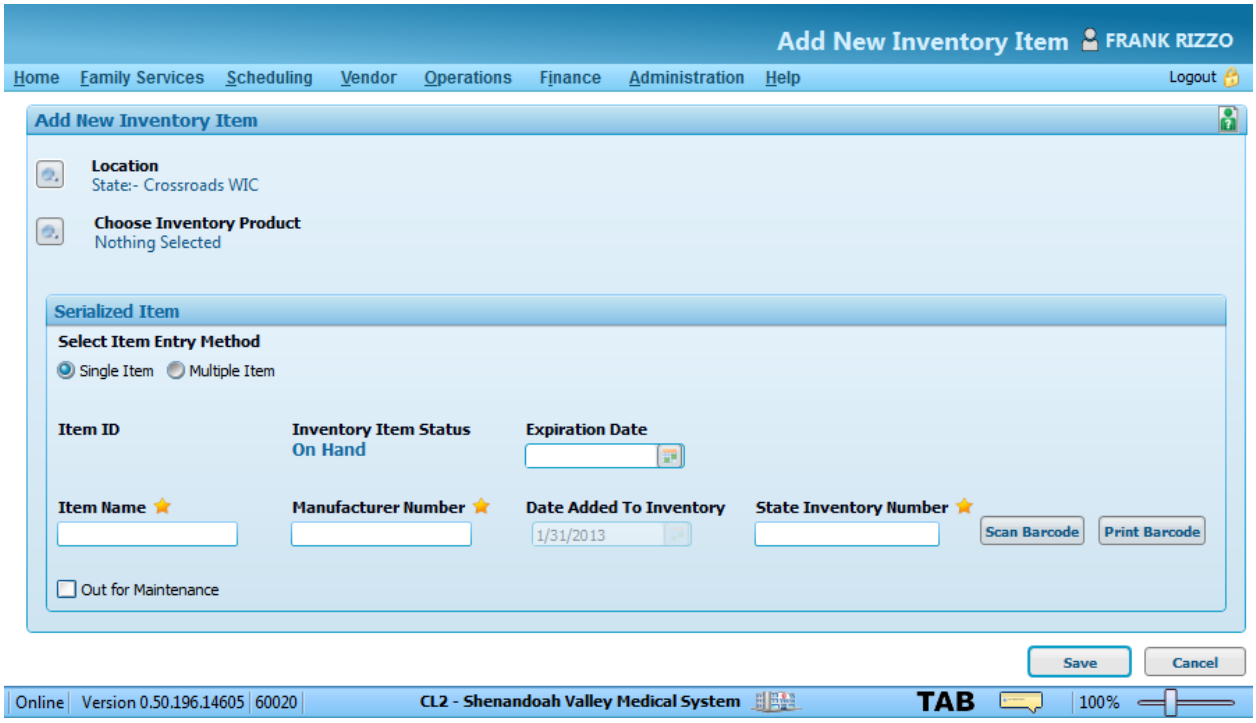
Task A. Adding Inventory

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → Inventory → Search Product Inventory**. The **Search Product Inventory** screen displays.

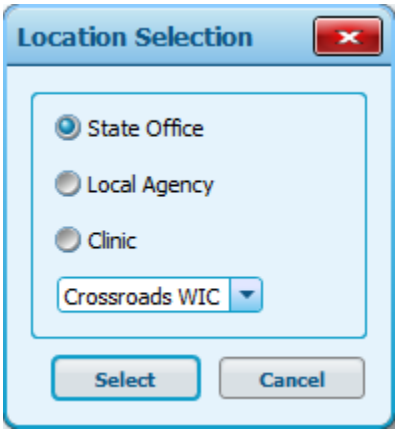


2. Click **Add New Item**. The **Add New Inventory Item** screen displays.

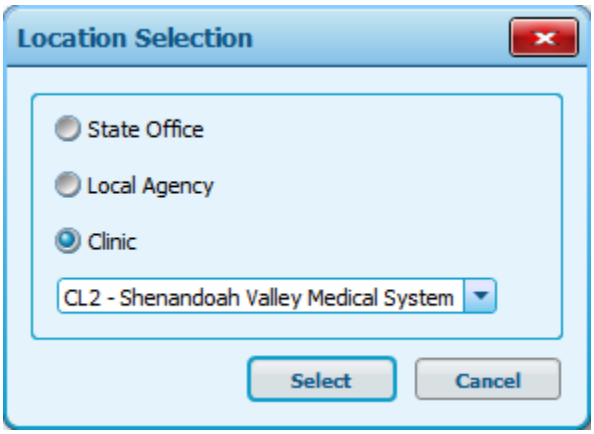


3. Update the selected **Location**, if necessary, by doing the following:

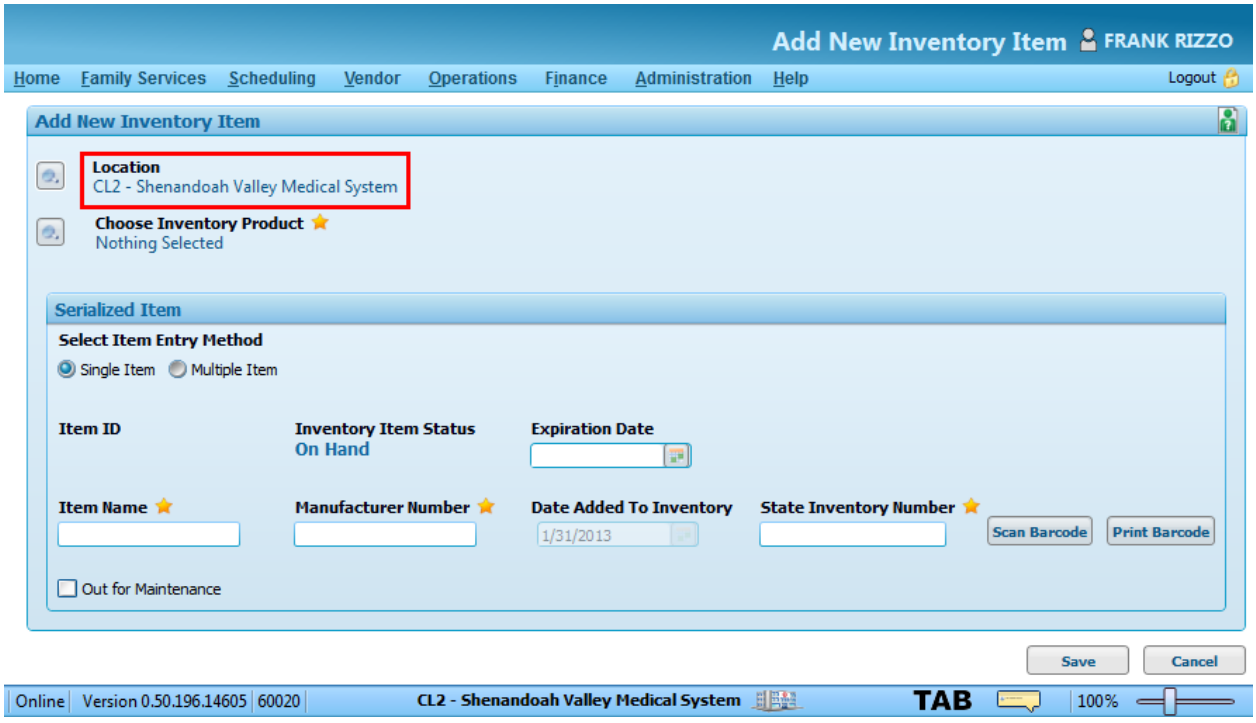
   - Click **Location Lookup** button ( ). The **Location Selection** screen displays.



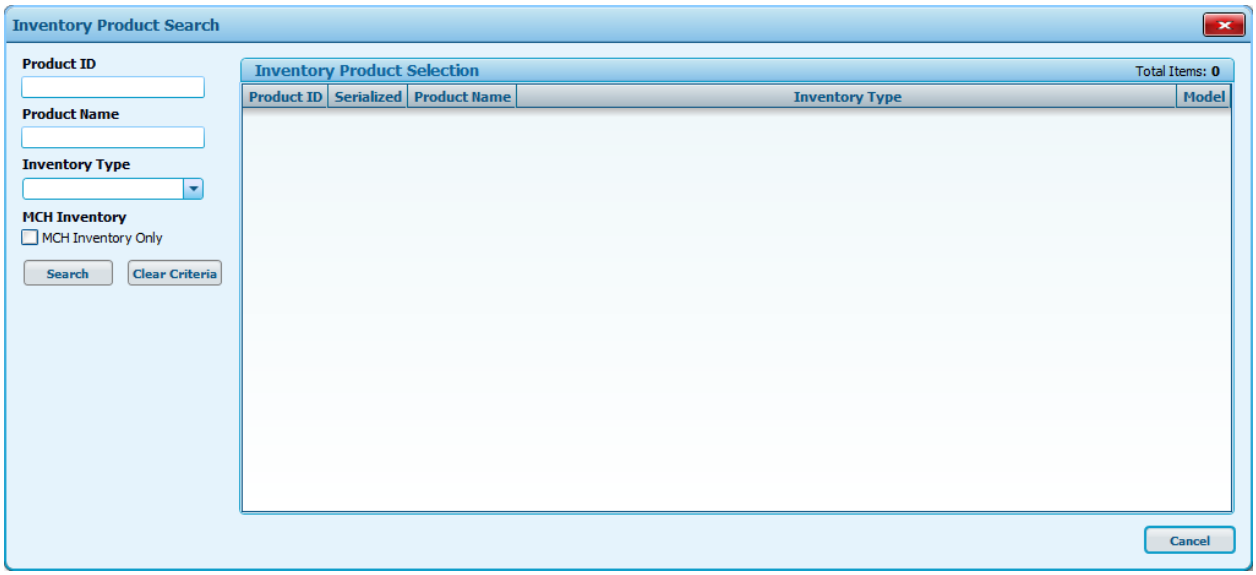
- Select the desired location as necessary.



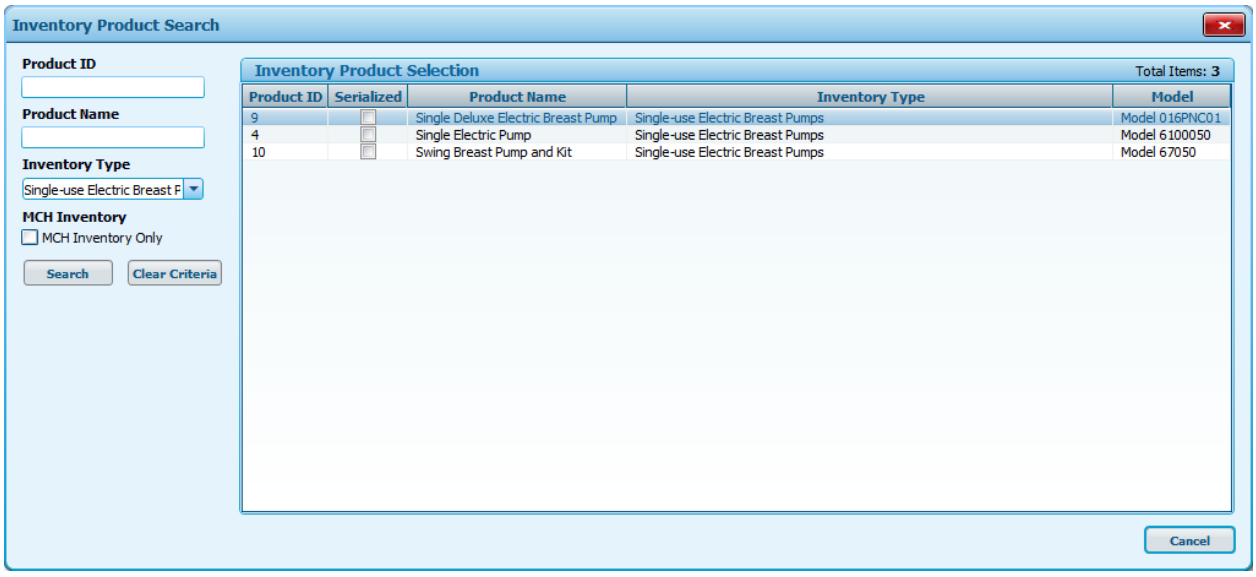
- Click **Select**. A status message displays indicating success and you are returned to the **Add New Inventory Item** screen.



4. Click **Choose Inventory Product** button ( ) to search for and select a product. The **Inventory Product Search** screen displays.



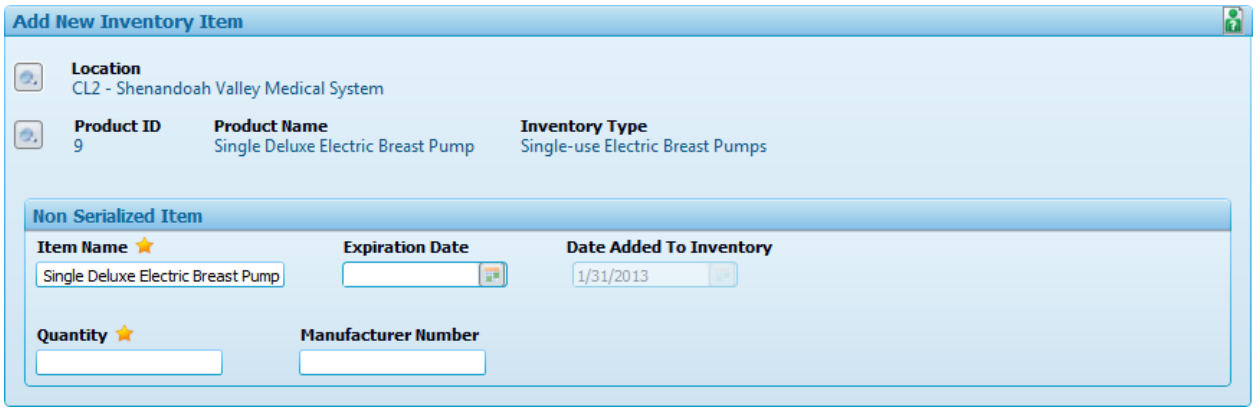
5. Search for a product by completing one or more of the following:
   - Enter a **Product ID**.
   - Enter a **Product Name**.
   - Select an **Inventory Type**.
6. Click **Search**. The **Inventory Product Selection** grid refreshes and displays the result of the search.



7. Double-click the desired product listed in the grid. The **Add New Inventory Item** screen refreshes and displays the selected product.
8. Complete additional information for the product in the item details section.

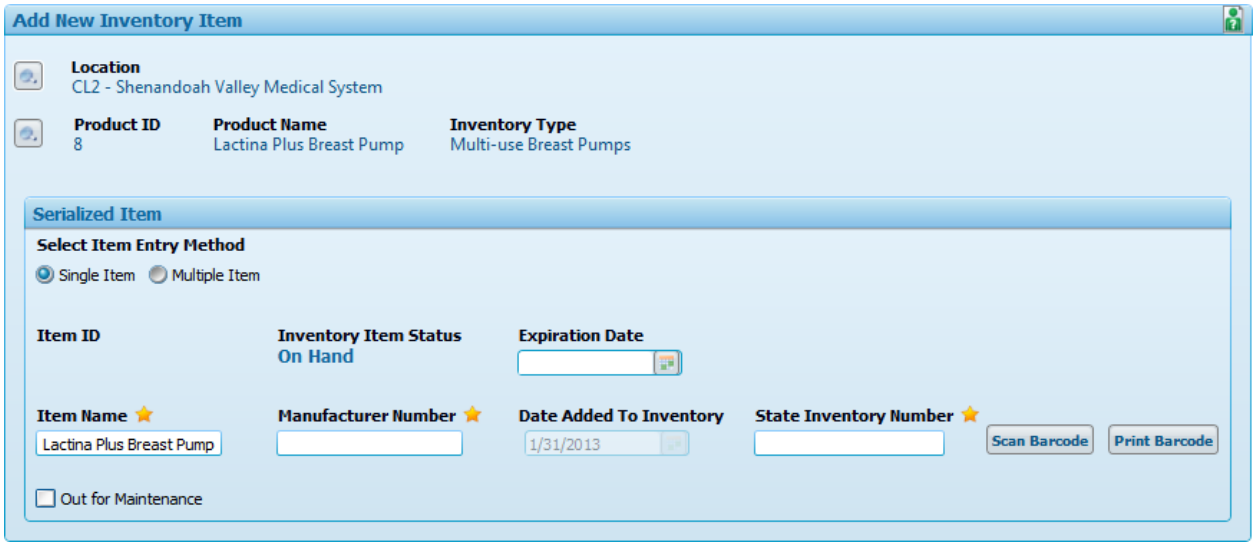
The item details section on the Add New Inventory Item screen displays differently for serialized and non-serialized items.

For a non-serialized item, the **Non Serialized Item** group box contains the item details.



- Update the **Item Name** if necessary.
- Enter or select the **Expiration Date** if necessary.
- Enter the **Quantity**.
- Enter or update the **Manufacturer Number** if necessary.

For a serialized item, the **Serialized Item** group box contains the item details.



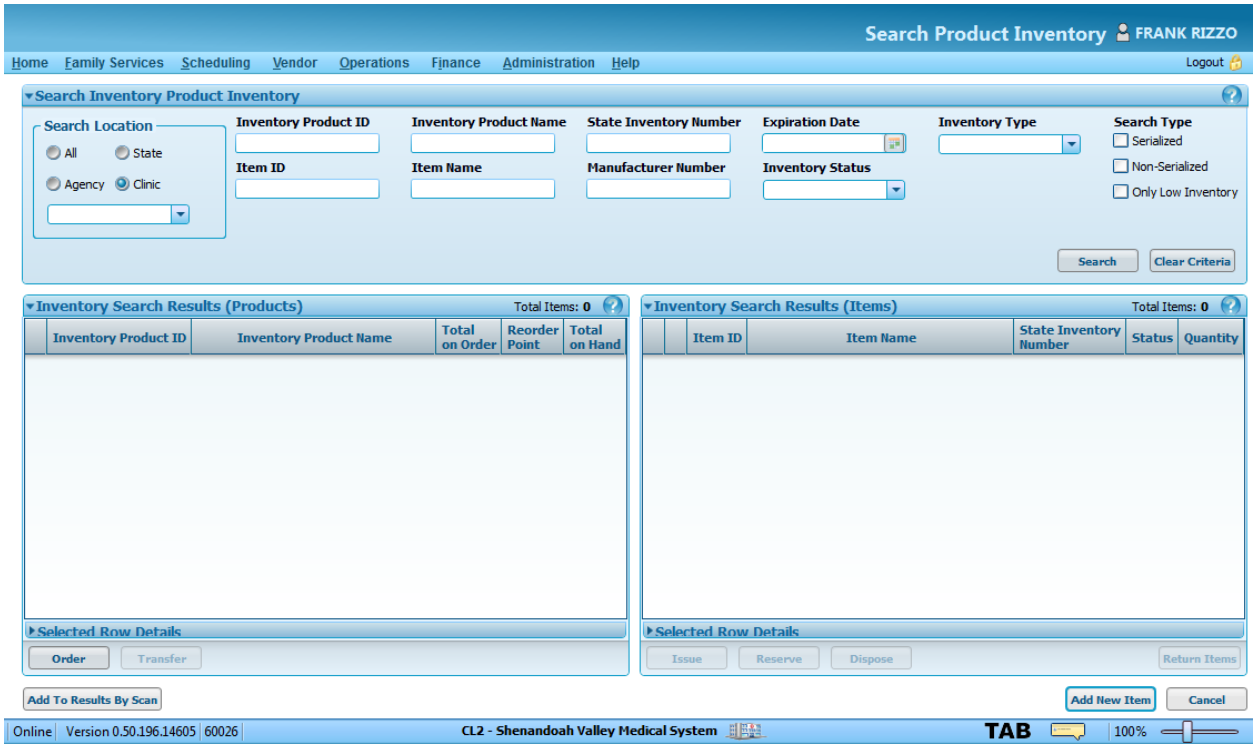
- Select either the **Single Item** or **Multiple Item** radio button under **Select Item Entry Method** as necessary.
- Enter or select the **Expiration Date** if necessary.
- Update the **Item Name** if necessary.
- Enter the **Manufacturer Number**.
- Enter the **State Inventory Number**, or click **Scan Barcode** to scan a bar code.
- Click **Print Barcode** to print the bar code if necessary.
- Select the **Out for Maintenance** check box if necessary.

9. Click **Save**. The **Search Product Inventory** screen refreshes and displays a status message indicating success.

Task B. Searching for Existing Inventory

Complete the following steps to perform this task:

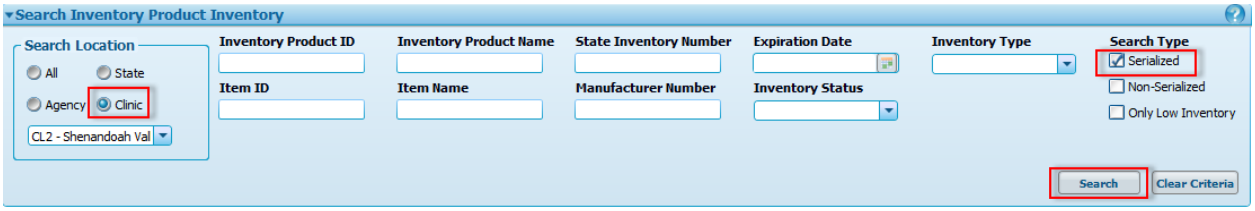
1. From the **Home** screen, go to **Operations → Inventory → Search Product Inventory**. The **Search Product Inventory** screen displays.



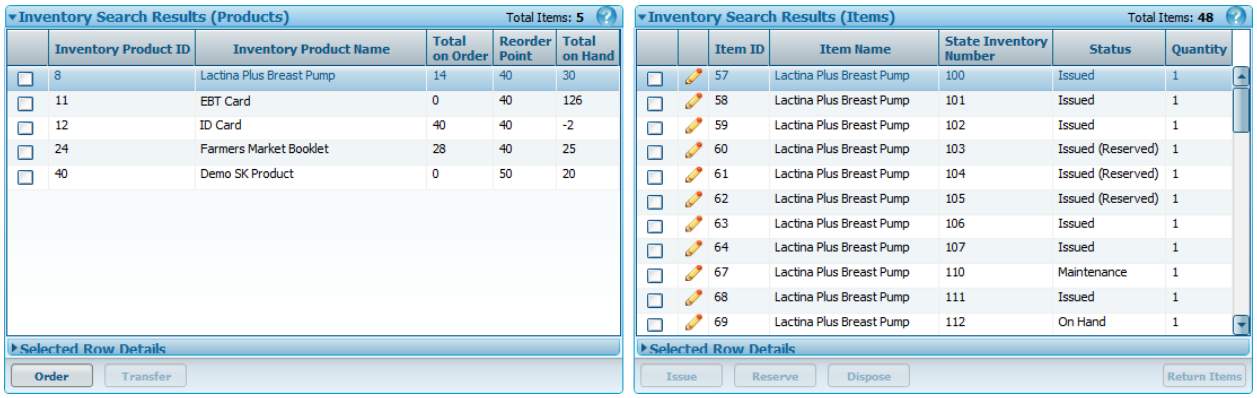
2. Under **Search Location**, select one of the following:
   - **All**
   - **State**
   - **Agency**
   - **Clinic**

Use the associated drop down list as necessary to further refine search criteria.

3. Complete one or more of the following:
    - Enter an **Inventory Product ID**.
    - Enter an **Inventory Product Name**.
    - Enter a **State Inventory Number**.
    - Enter or select an **Expiration Date**.
    - Select an **Inventory Type**.
    - Enter an **Item ID**.
    - Enter an **Item Name**.
    - Enter a **Manufacturer Number**.
    - Select an **Inventory Status**.
4. Select one of the following options under **Search Type**:
    - **Serialized**
    - **Non-Serialized**
    - **Only Low Inventory**



5. Click **Search**. The **Inventory Search Results (Products)** and **Inventory Search Results (Items)** grids refresh and display the results of the search.

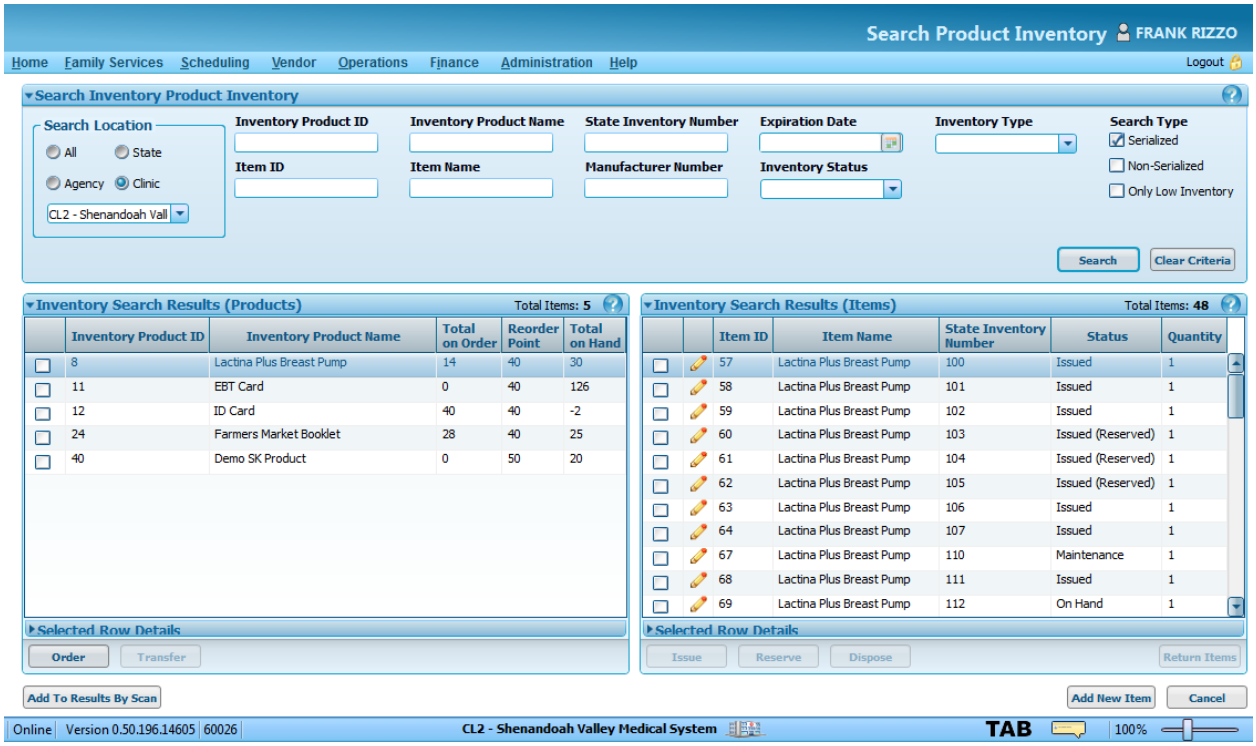

Inventory Search Results (Products)
Total Items: 5
Inventory Product ID
Inventory Product Name
Total on Order
Reorder Point
Total on Hand
8 Lactina Plus Breast Pump 14 40 30
11 EBT Card 0 40 126
12 ID Card 40 40 -2
24 Farmers Market Booklet 28 40 25
40 Demo SK Product 0 50 20
Selected Row Details
Order
Transfer
Inventory Search Results (Items)
Total Items: 48
Item ID
Item Name
State Inventory Number
Status
Quantity
57 Lactina Plus Breast Pump 100 Issued 1
58 Lactina Plus Breast Pump 101 Issued 1
59 Lactina Plus Breast Pump 102 Issued 1
60 Lactina Plus Breast Pump 103 Issued (Reserved) 1
61 Lactina Plus Breast Pump 104 Issued (Reserved) 1
62 Lactina Plus Breast Pump 105 Issued (Reserved) 1
63 Lactina Plus Breast Pump 106 Issued 1
64 Lactina Plus Breast Pump 107 Issued 1
67 Lactina Plus Breast Pump 110 Maintenance 1
68 Lactina Plus Breast Pump 111 Issued 1
69 Lactina Plus Breast Pump 112 On Hand 1
Selected Row Details
Issue
Reserve
Dispose
Return Items

Click Add To Results By Scan to add to the product inventory by using a barcode scanning device to directly add items to the inventory. After scanning the items will appear in the Inventory Search Results grid.

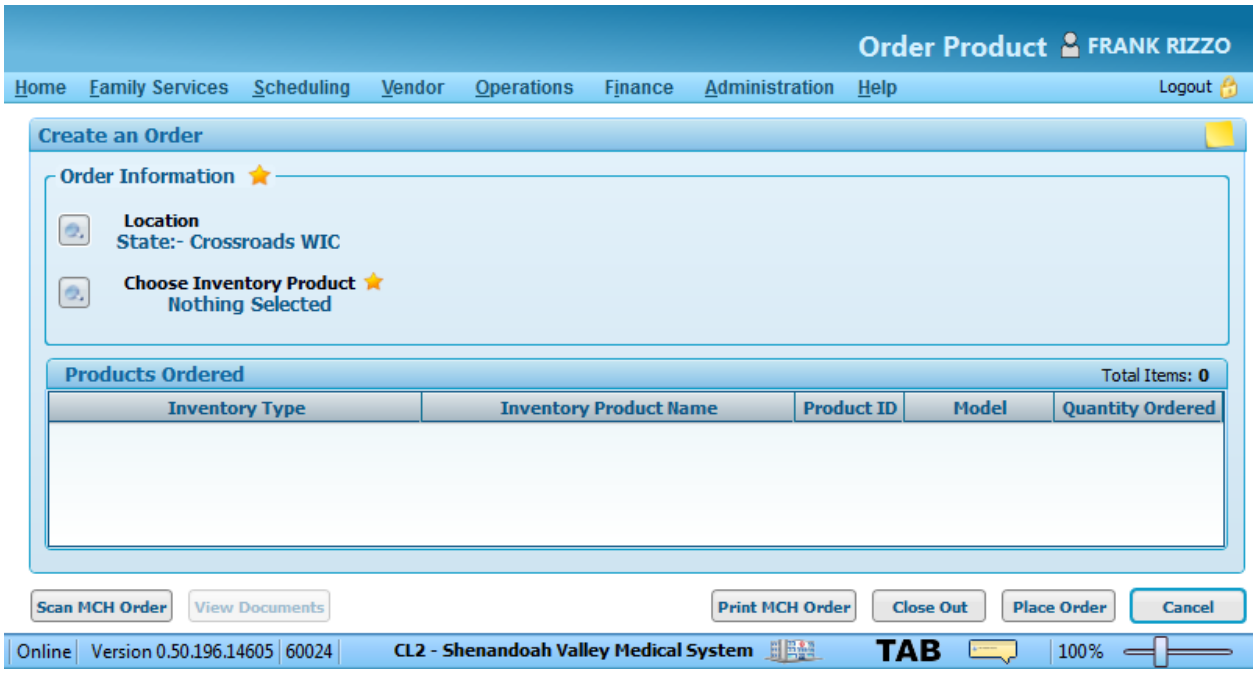
Task C. Ordering Inventory

Complete the following steps to perform this task:

1. On the **Search Product Inventory** screen, perform a search if necessary.

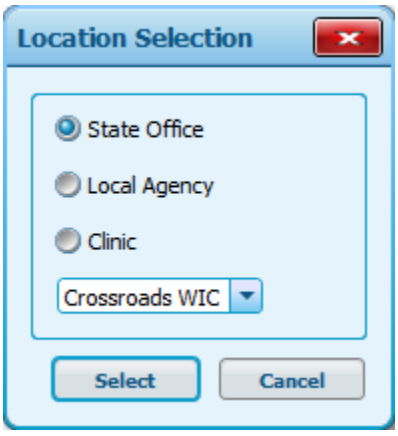


2. Click **Order**. The **Order Product** screen displays.

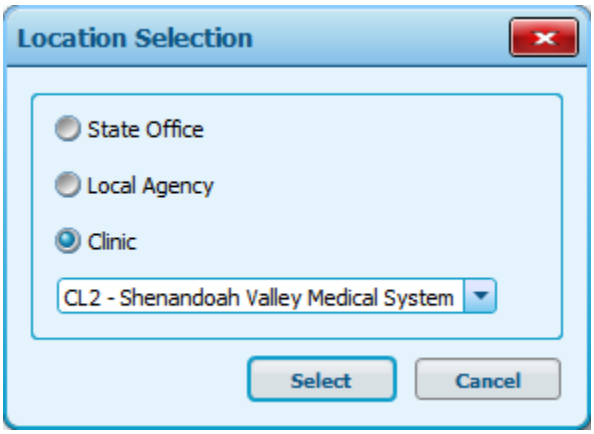


3. Update the selected **Location**, if necessary, by doing the following:

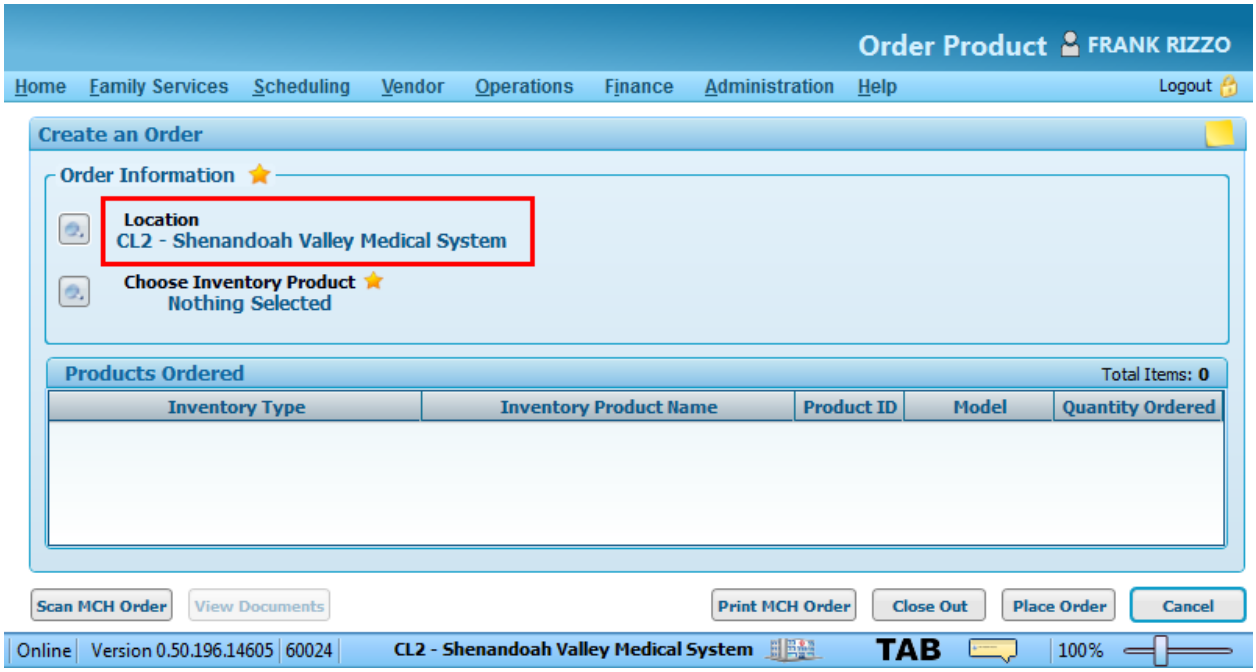
   - Click **Choose Location** button ( ). The **Location Selection** screen displays.



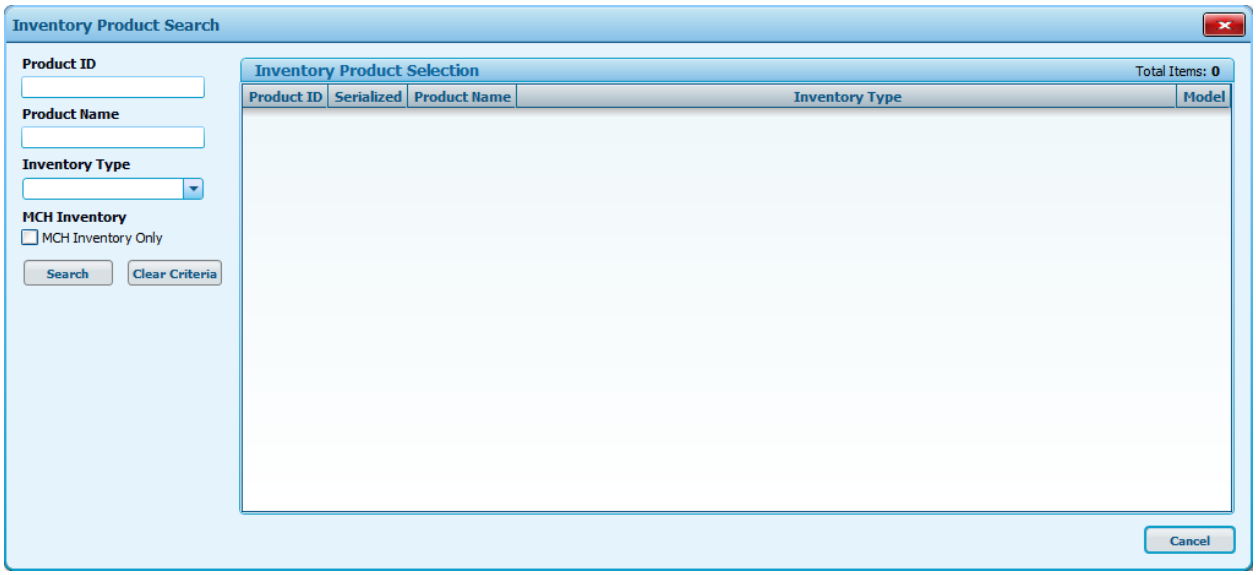
- Select the desired location as necessary.



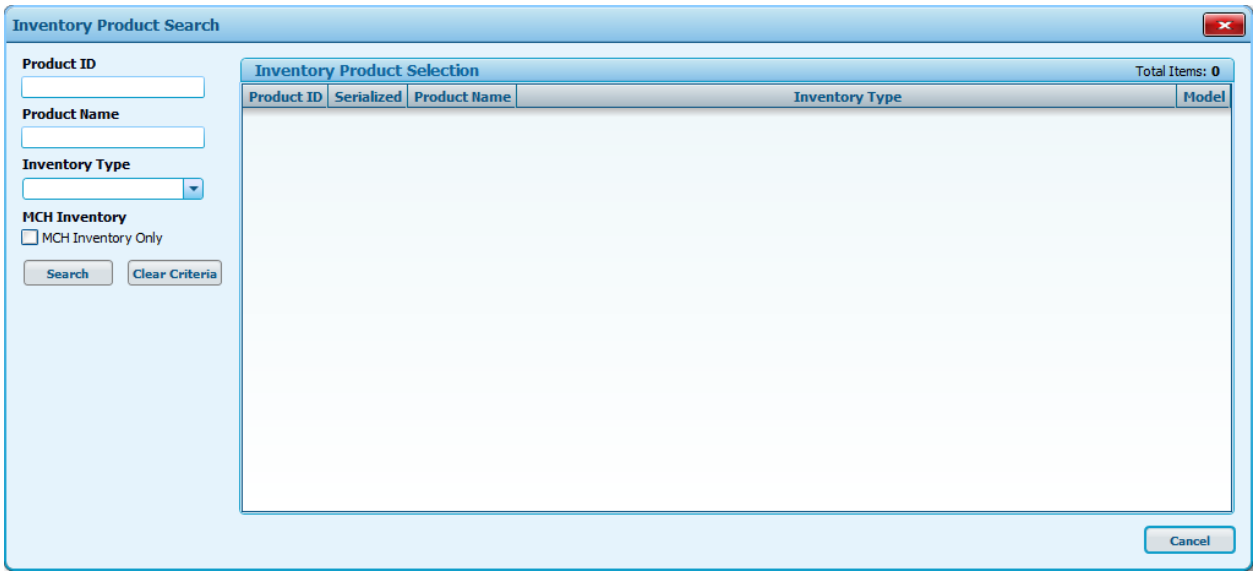
- Click **Select**. A status message displays indicating success and you are returned to the **Order Product** screen.



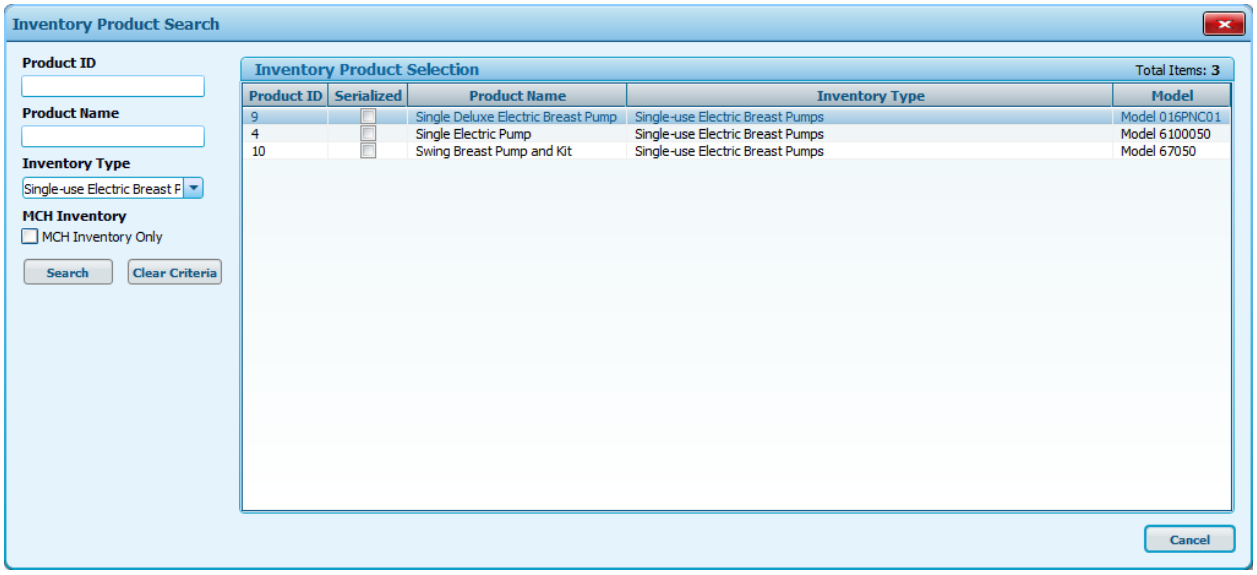
4. Click **Choose Inventory Product** button ( ) to search for and select a product. The **Inventory Product Search** screen displays.



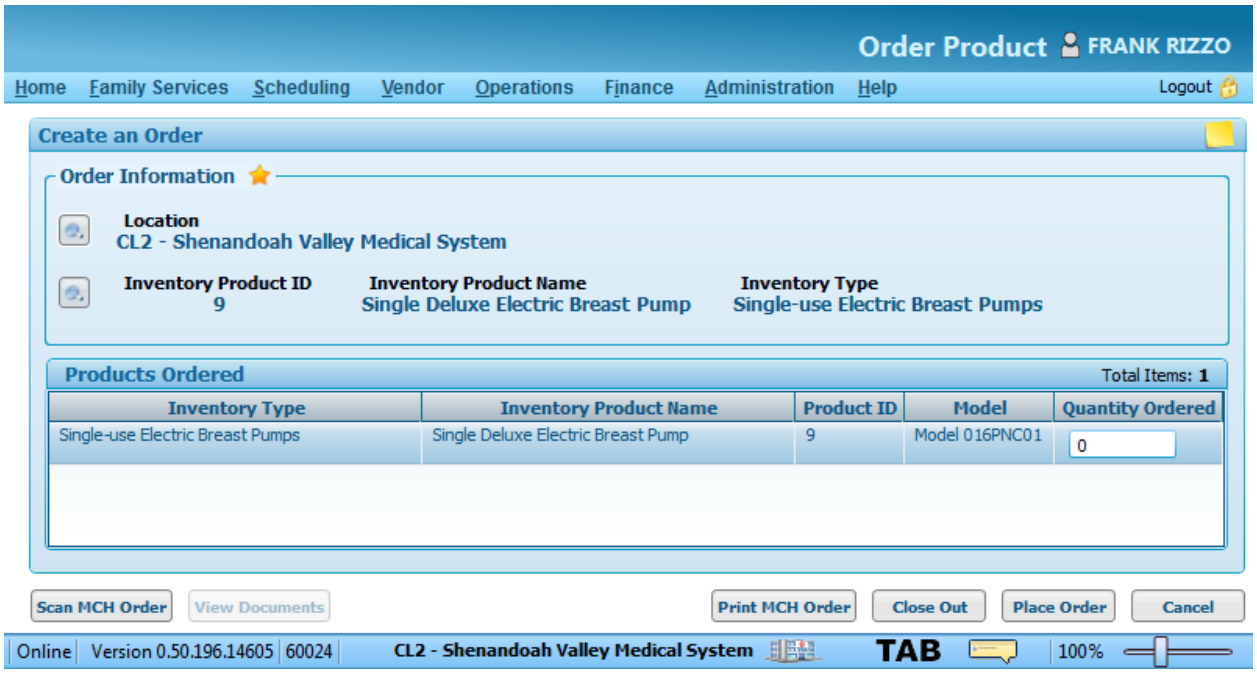
5. Search for a product by completing one or more of the following:
   - Enter a **Product ID**.
   - Enter a **Product Name**.
   - Select an **Inventory Type**.
6. Click **Choose Inventory Product** button ( ) to search for and select a product. The **Inventory Product Search** screen displays.



7. Search for a product by completing one or more of the following:
   - Enter a **Product ID**.
   - Enter a **Product Name**.
   - Select an **Inventory Type**.
8. Click **Search**. The **Inventory Product Selection** grid refreshes and displays the result of the search.



9. Double-click the desired product listed in the grid. The **Order Product** screen refreshes and displays the selected product in the **Products Ordered** grid.



10. Enter the quantity of items to order in the **Quantity Ordered** column of the **Products Ordered** grid.

Repeat the process as necessary to add additional products to the order.

Products Ordered Total Items: **1**

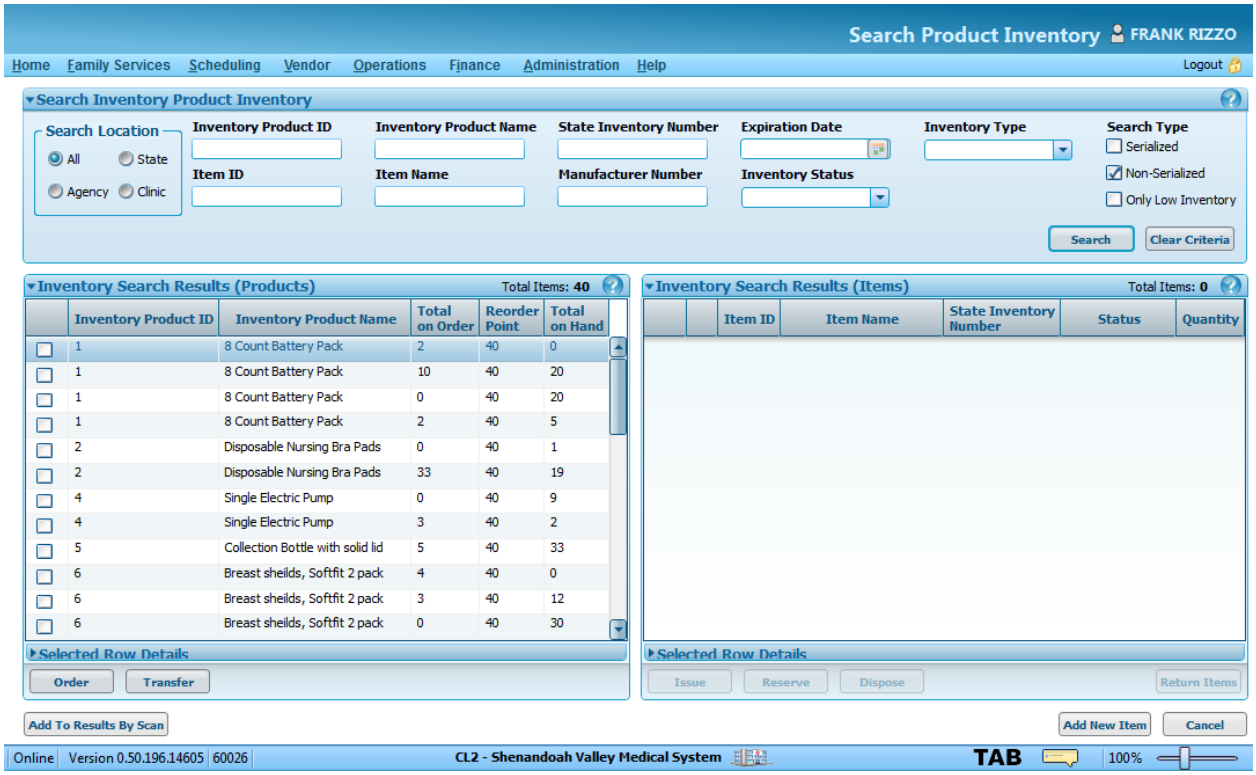
Inventory Type	Inventory Product Name	Product ID	Model	Quantity Ordered
Single-use Electric Breast Pumps	Single Deluxe Electric Breast Pump	9	Model 016PNC01	10

11. Click **Place Order**. The **Search Product Inventory** screen refreshes and displays a status message indicating success.

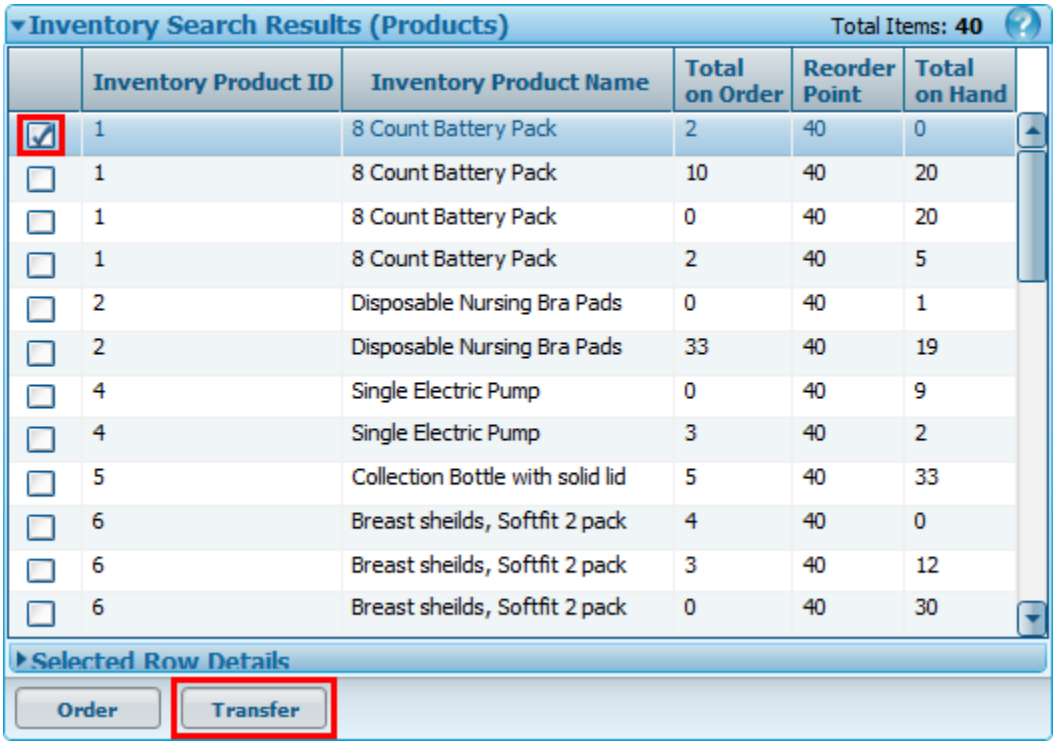
Task D. Transferring Inventory

Complete the following steps to perform this task:

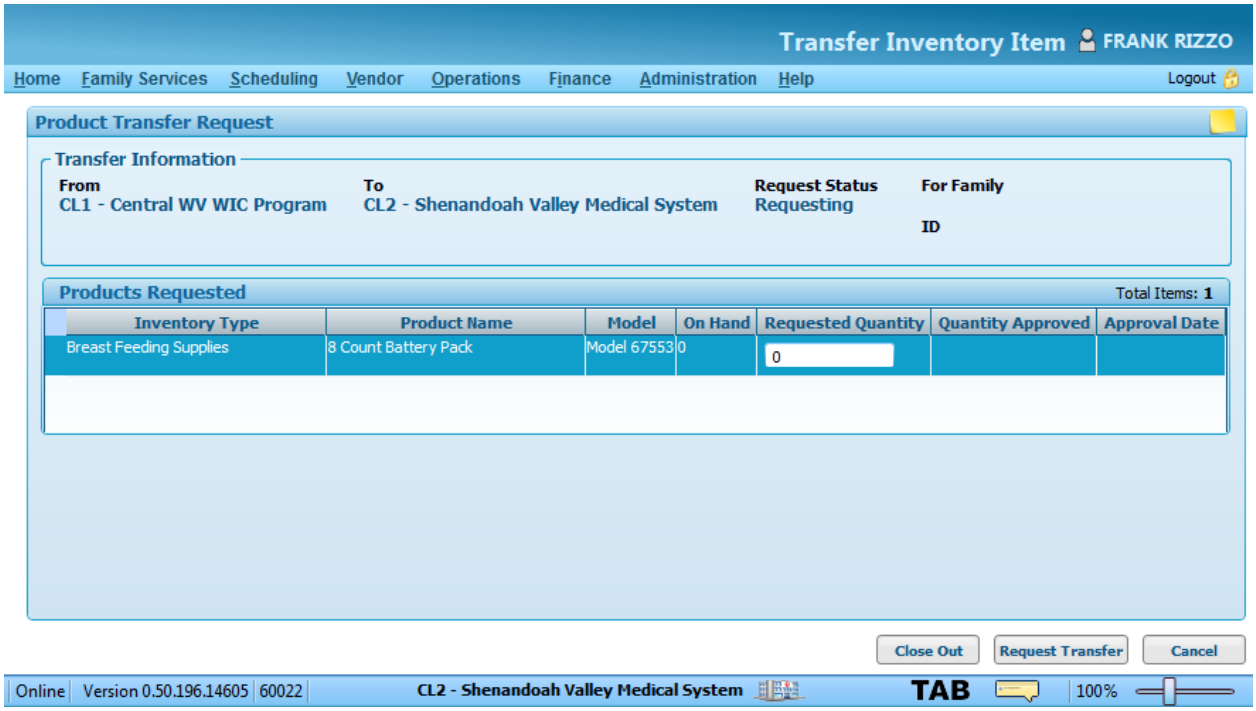
1. On the **Search Product Inventory** screen, perform a search if necessary.



2. Select the check box for one or more products to transfer in the **Inventory Search Results (Products)** grid.


Inventory Search Results (Products)
Total Items: 40
Inventory Product ID
Inventory Product Name
Total on Order
Reorder Point
Total on Hand
1 8 Count Battery Pack 2 40 0
1 8 Count Battery Pack 10 40 20
1 8 Count Battery Pack 0 40 20
1 8 Count Battery Pack 2 40 5
2 Disposable Nursing Bra Pads 0 40 1
2 Disposable Nursing Bra Pads 33 40 19
4 Single Electric Pump 0 40 9
4 Single Electric Pump 3 40 2
5 Collection Bottle with solid lid 5 40 33
6 Breast sheilds, Softfit 2 pack 4 40 0
6 Breast sheilds, Softfit 2 pack 3 40 12
6 Breast sheilds, Softfit 2 pack 0 40 30
Selected Row Details
Order
Transfer

3. Click **Transfer**. The **Transfer Inventory Item** screen displays.



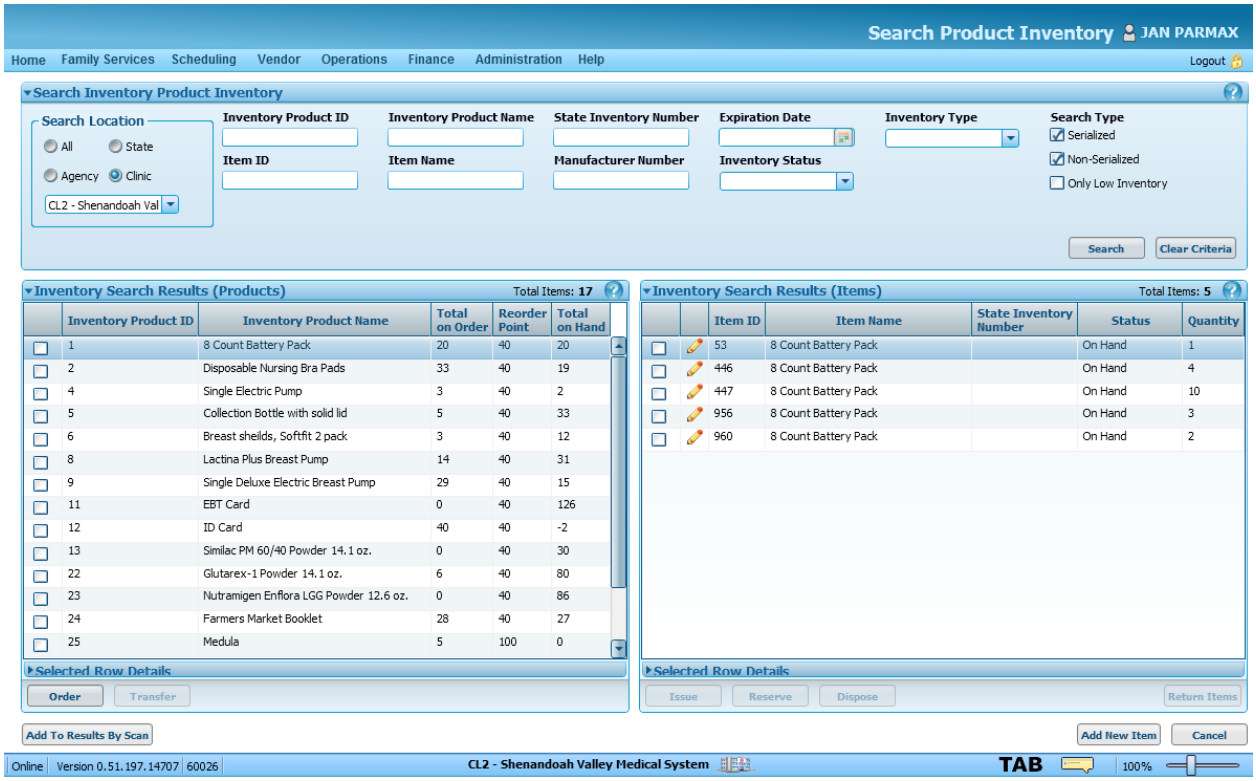
4. Update the quantity in the **Requested Quantity** column of the **Products Requested** grid as necessary.

5. Click **Request Transfer**. The **Search Product Inventory** screen refreshes and displays a status message indicating success.

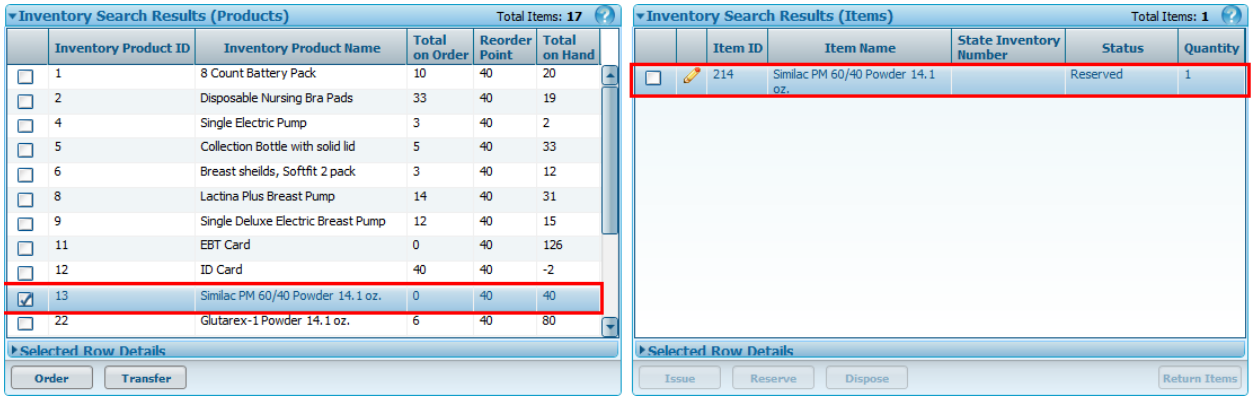
Task E. Issuing Inventory

Complete the following steps to perform this task:

1. On the **Search Product Inventory** screen, perform a search if necessary.

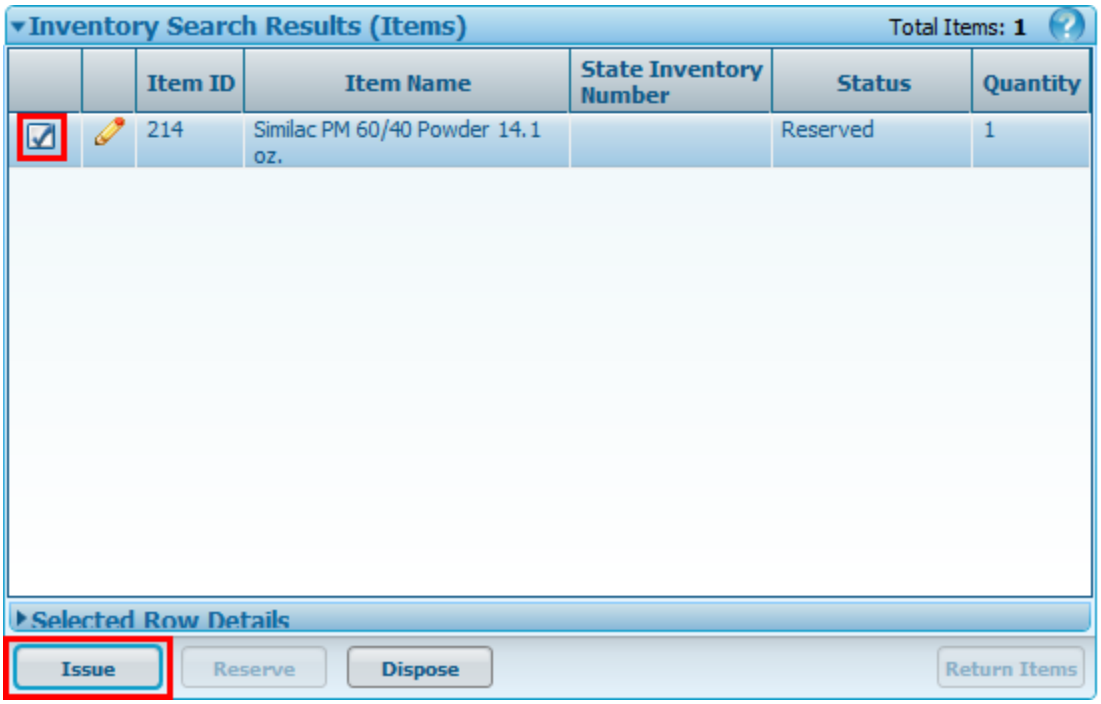


2. Double-click a product listed within the **Inventory Search Results (Products)** grid. The items associated to the selected product display in the **Inventory Search Results (Items)** grid.

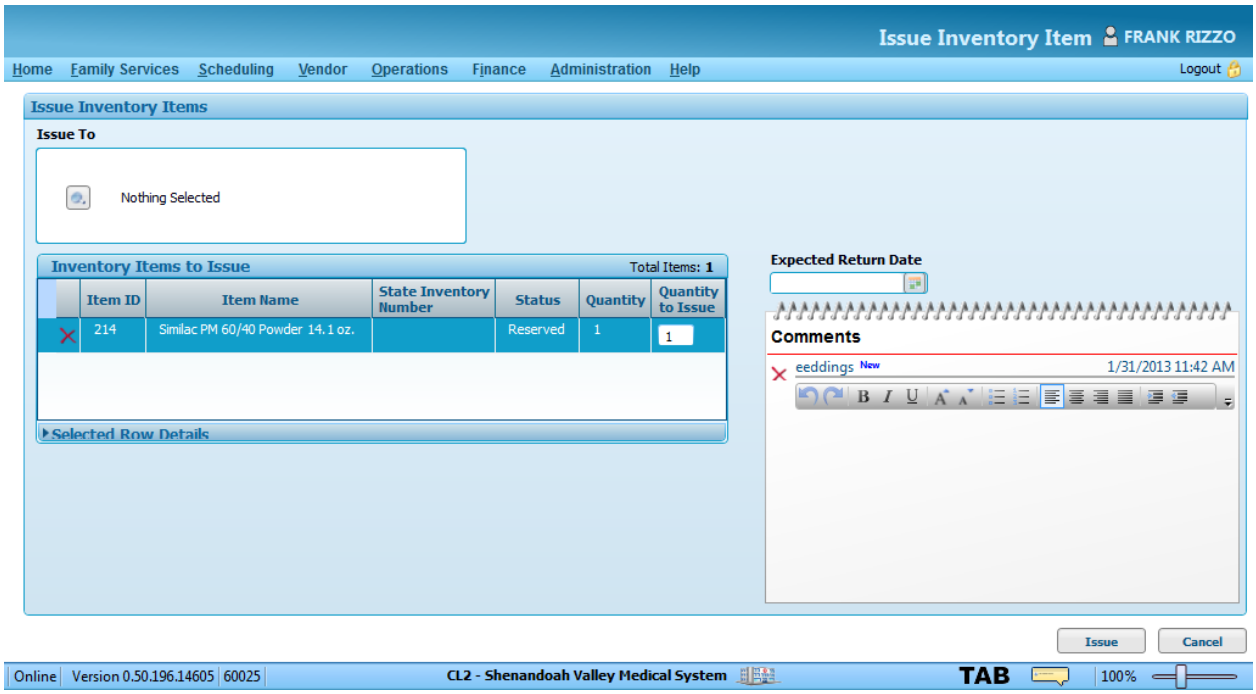

Inventory Search Results (Products)
Total Items: 17
Inventory Product ID
Inventory Product Name
Total on Order
Reorder Point
Total on Hand
1 8 Count Battery Pack 10 40 20
2 Disposable Nursing Bra Pads 33 40 19
4 Single Electric Pump 3 40 2
5 Collection Bottle with solid lid 5 40 33
6 Breast sheilds, Softfit 2 pack 3 40 12
8 Lactina Plus Breast Pump 14 40 31
9 Single Deluxe Electric Breast Pump 12 40 15
11 EBT Card 0 40 126
12 ID Card 40 40 -2
13 Similac PM 60/40 Powder 14.1 oz. 0 40 40
22 Glutarex-1 Powder 14.1 oz. 6 40 80
Selected Row Details
Order
Transfer
Inventory Search Results (Items)
Total Items: 1
Item ID
Item Name
State Inventory Number
Status
Quantity
214 Similac PM 60/40 Powder 14.1 oz. Reserved 1
Selected Row Details
Issue
Reserve
Dispose
Return Items

Notice the current Quantity of the item selected. Once the item has been issued, the Quantity value is adjusted.

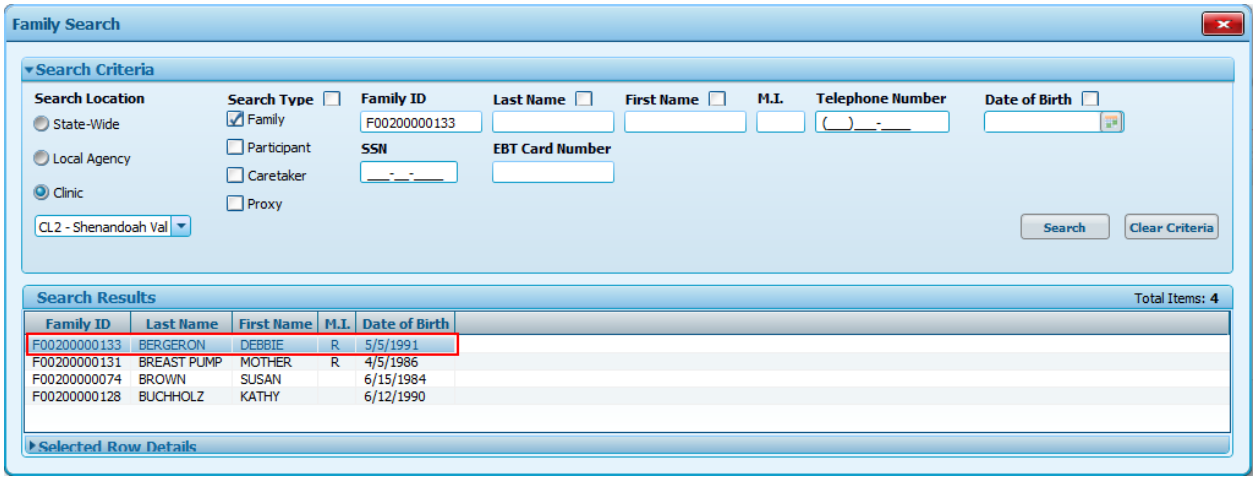
3. Select the check box associated to an item within the **Inventory Search Results (Items)** grid.



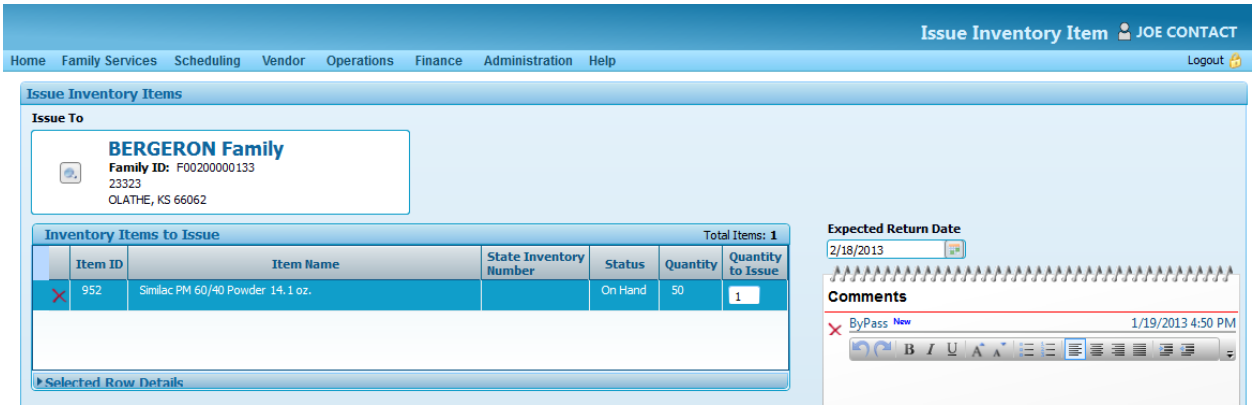
4. Click **Issue**. The **Issue Inventory Item** screen displays.



5. Select the **Lookup Family** button ( ). The **Family Search** screen displays.
6. Conduct a search for the desired family record.

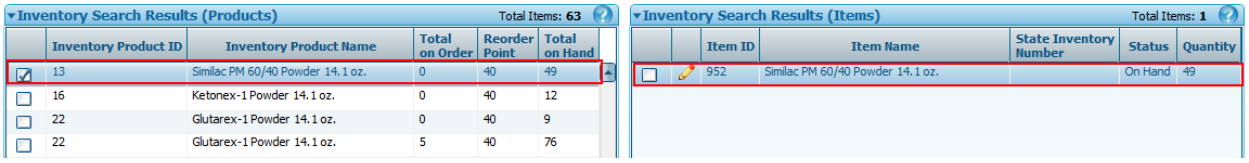


7. Double-click the desired family listed within the **Search Results** grid. The **Issue inventory Item** screen refreshes and displays the selected family's information.



8. Update the quantity in the **Quantity to Issue** column of the **Inventory Items to Issue** grid as necessary.
9. Update the **Expected Return Date** as necessary.
10. Enter **Comments** as necessary.
11. Click the **Selected Row Details** to view detailed information about the inventory item.

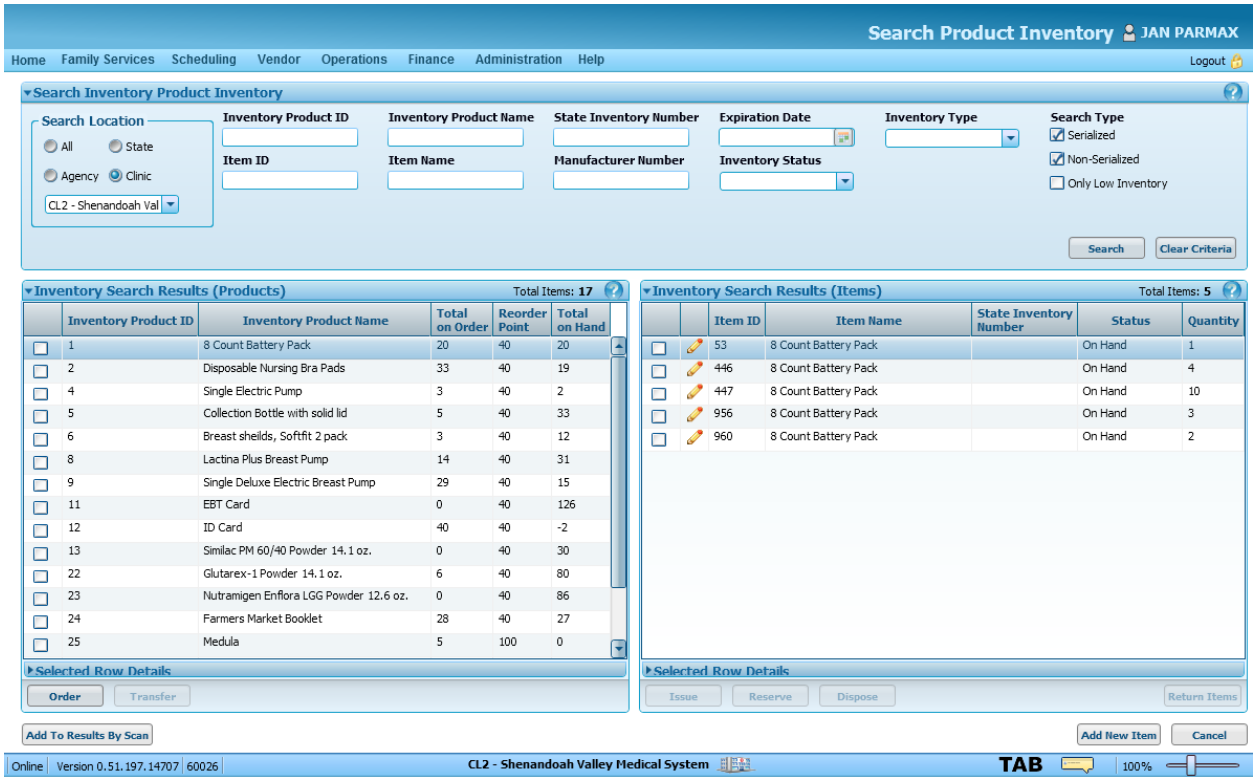
12. Click **Issue**. The **Search Product Inventory** screen refreshes and displays a status message indicating success. The **Inventory Search Results (Items)** grid refreshes and displays the updated "On Hand" **Quantity**.



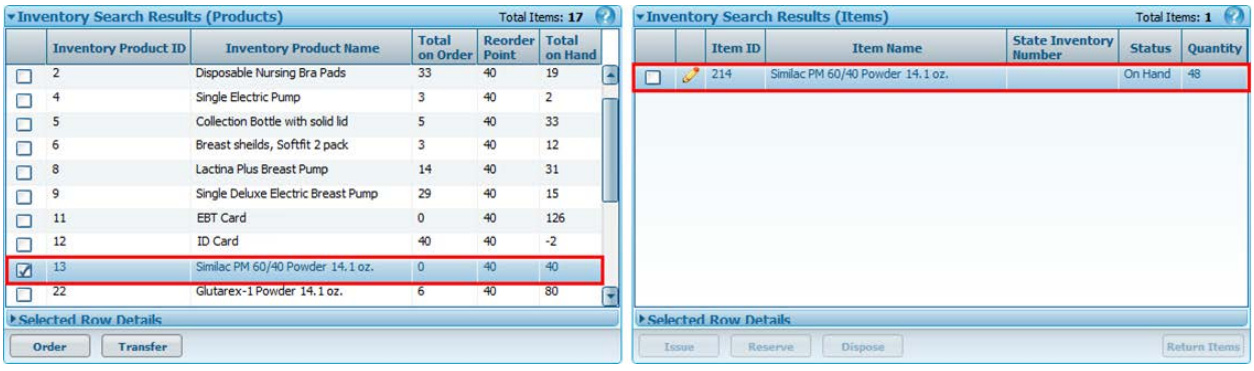
Task F. Reserving Inventory

Complete the following steps to perform this task:

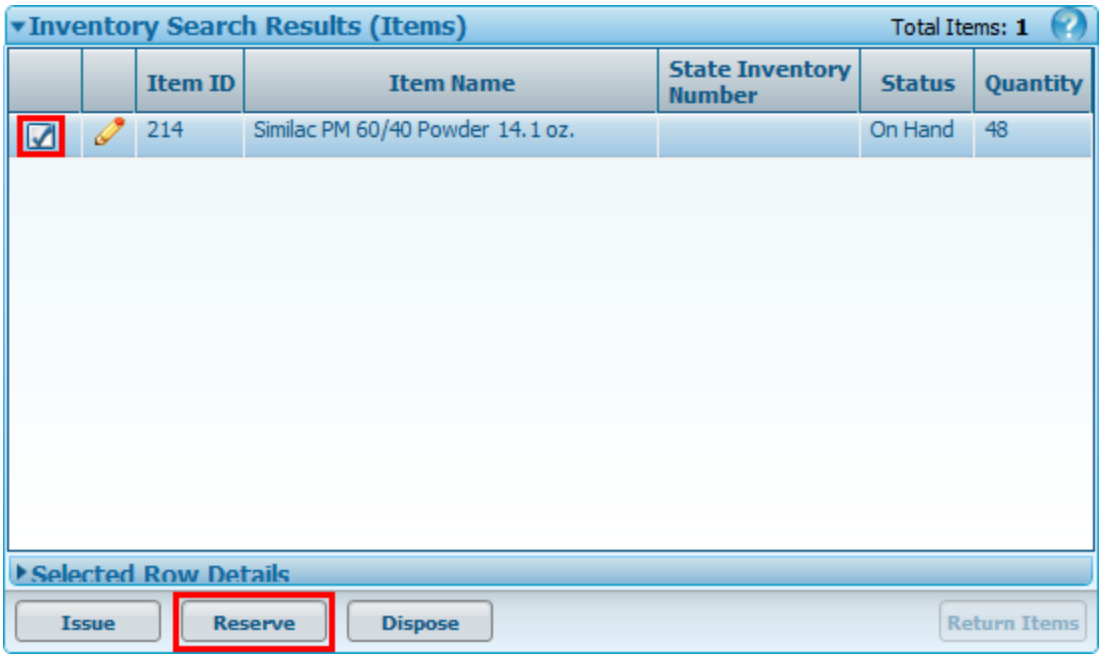
1. On the **Search Product Inventory** screen, perform a search if necessary.



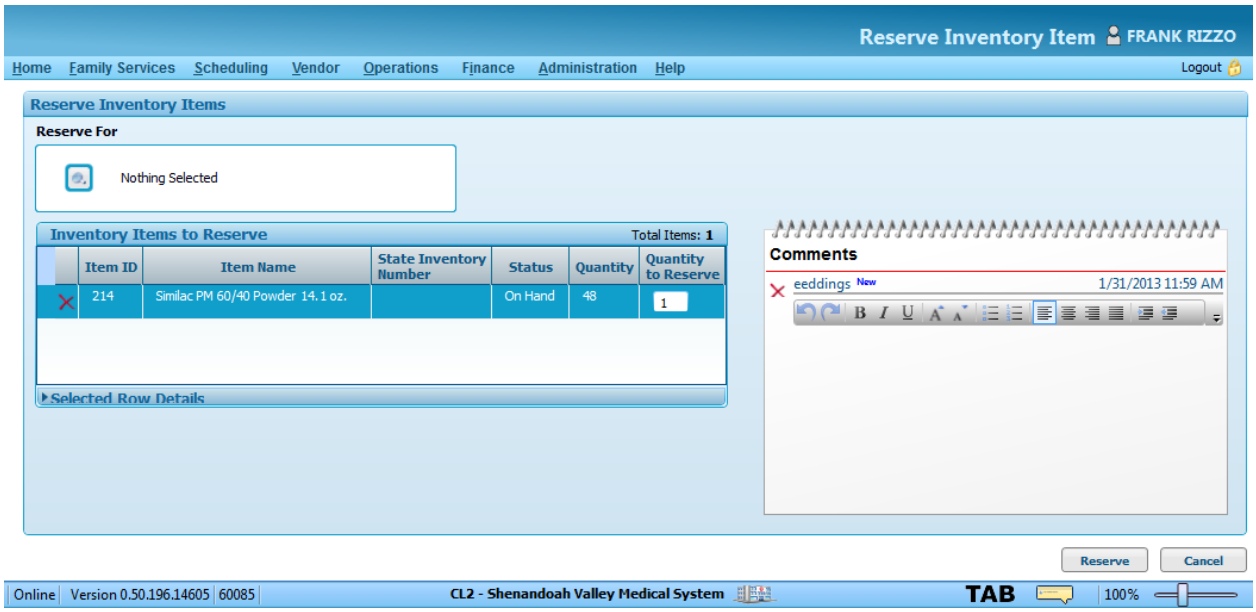
2. Double-click a product listed within the **Inventory Search Results (Products)** grid. The items associated to the selected product display in the **Inventory Search Results (Items)** grid.


Inventory Search Results (Products)
Total Items: 17
Inventory Product ID
Inventory Product Name
Total on Order
Reorder Point
Total on Hand
2 Disposable Nursing Bra Pads 33 40 19
4 Single Electric Pump 3 40 2
5 Collection Bottle with solid lid 5 40 33
6 Breast sheilds, Softfit 2 pack 3 40 12
8 Lactina Plus Breast Pump 14 40 31
9 Single Deluxe Electric Breast Pump 29 40 15
11 EBT Card 0 40 126
12 ID Card 40 40 -2
13 Similac PM 60/40 Powder 14.1 oz. 0 40 40
22 Glutarex-1 Powder 14.1 oz. 6 40 80
Selected Row Details
Order
Transfer
Inventory Search Results (Items)
Total Items: 1
Item ID
Item Name
State Inventory Number
Status
Quantity
214 Similac PM 60/40 Powder 14.1 oz. On Hand 48
Selected Row Details
Issue
Reserve
Dispose
Return Items

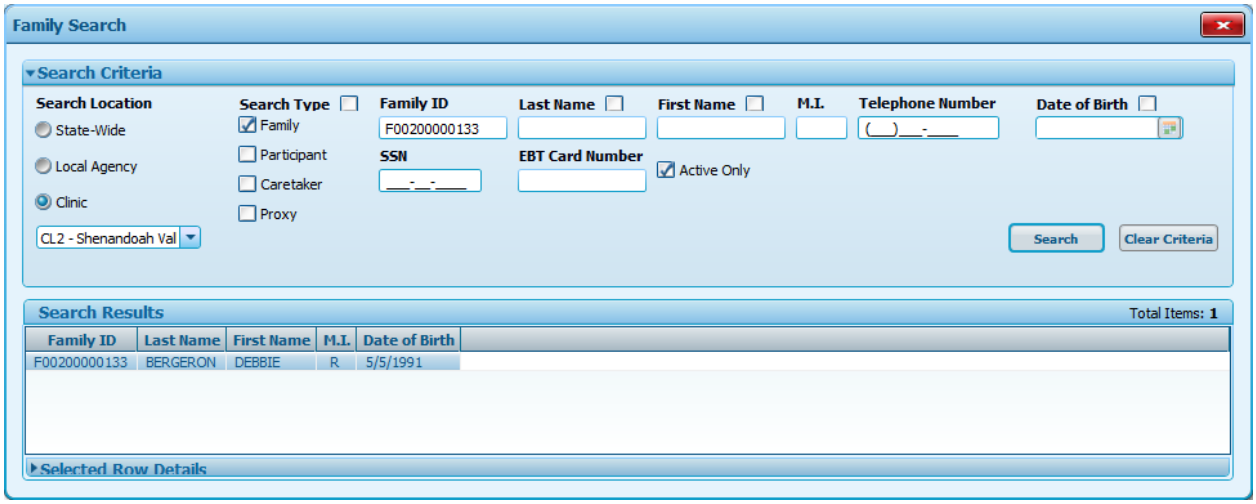
3. Select the check box associated to an item within the **Inventory Search Results (Items)** grid.



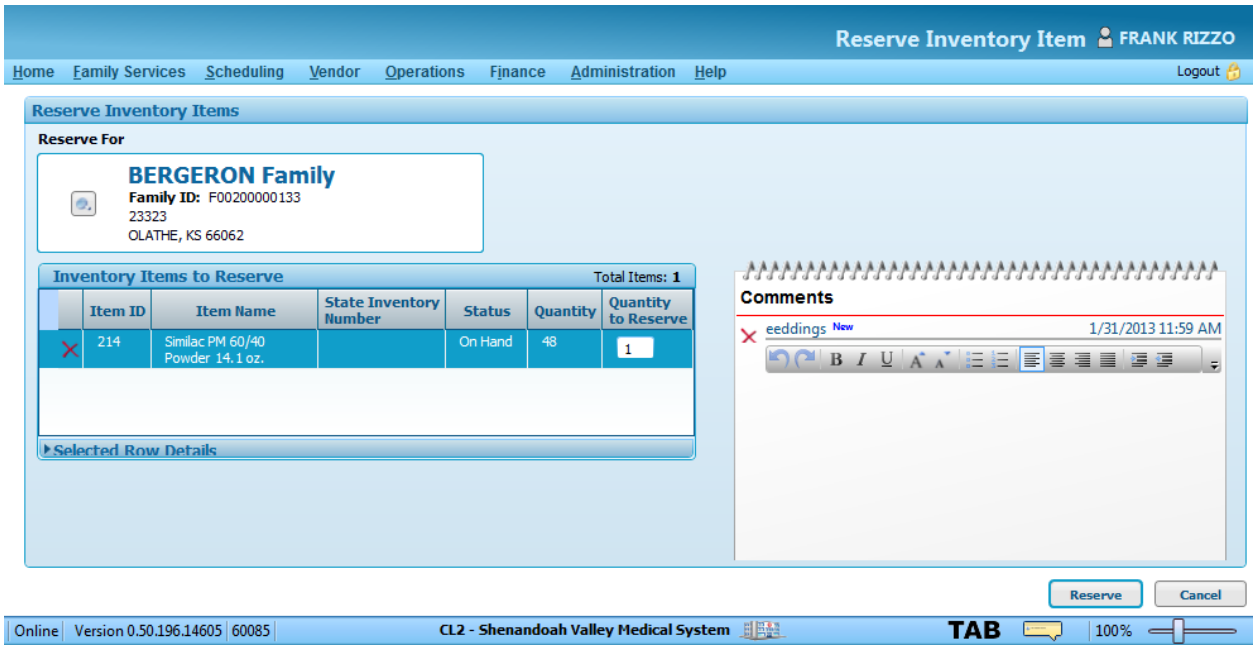
4. Click **Reserve**. The **Reserve Inventory Item** screen displays.



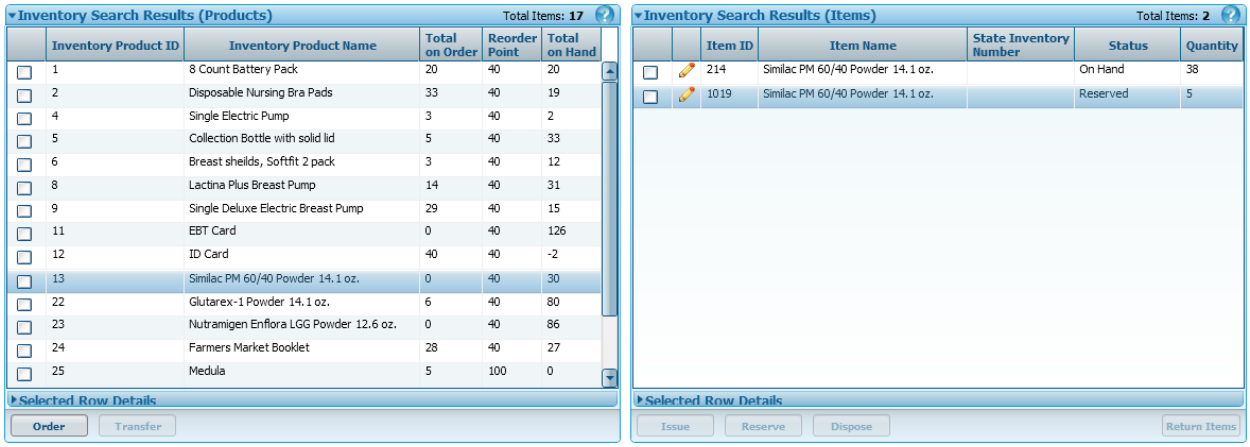
5. Select the **Lookup Family** button ( ). The **Family Search** screen displays.
6. Conduct a search for the desired family record.



7. Double-click the desired family listed within the **Search Results** grid. The **Reserve Inventory Item** screen refreshes and displays the selected family's information.



8. Update the quantity in the **Quantity to Reserve** column of the **Inventory Items to Reserve** grid as necessary.
9. Enter **Comments** as necessary.
10. Click **Reserve**. The **Search Product Inventory** screen refreshes and displays a status message indicating success. The **Inventory Search Results (Items)** grid refreshes and displays the updated "On Hand" **Quantity** and a new record displays the "Reserved" inventory items.



Inventory Search Results (Products) — Total Items: 17

	Inventory Product ID	Inventory Product Name	Total on Order	Reorder Point	Total on Hand
☐	1	8 Count Battery Pack	20	40	20
☐	2	Disposable Nursing Bra Pads	33	40	19
☐	4	Single Electric Pump	3	40	2
☐	5	Collection Bottle with solid lid	5	40	33
☐	6	Breast sheilds, Softfit 2 pack	3	40	12
☐	8	Lactina Plus Breast Pump	14	40	31
☐	9	Single Deluxe Electric Breast Pump	29	40	15
☐	11	EBT Card	0	40	126
☐	12	ID Card	40	40	-2
☐	13	Similac PM 60/40 Powder 14.1 oz.	0	40	30
☐	22	Glutarex-1 Powder 14.1 oz.	6	40	80
☐	23	Nutramigen Enflora LGG Powder 12.6 oz.	0	40	86
☐	24	Farmers Market Booklet	28	40	27
☐	25	Medula	5	100	0

Selected Row Details

Order | Transfer

Inventory Search Results (Items) — Total Items: 2

		Item ID	Item Name	State Inventory Number	Status	Quantity
☐	✎	214	Similac PM 60/40 Powder 14.1 oz.		On Hand	38
☐	✎	1019	Similac PM 60/40 Powder 14.1 oz.		Reserved	5

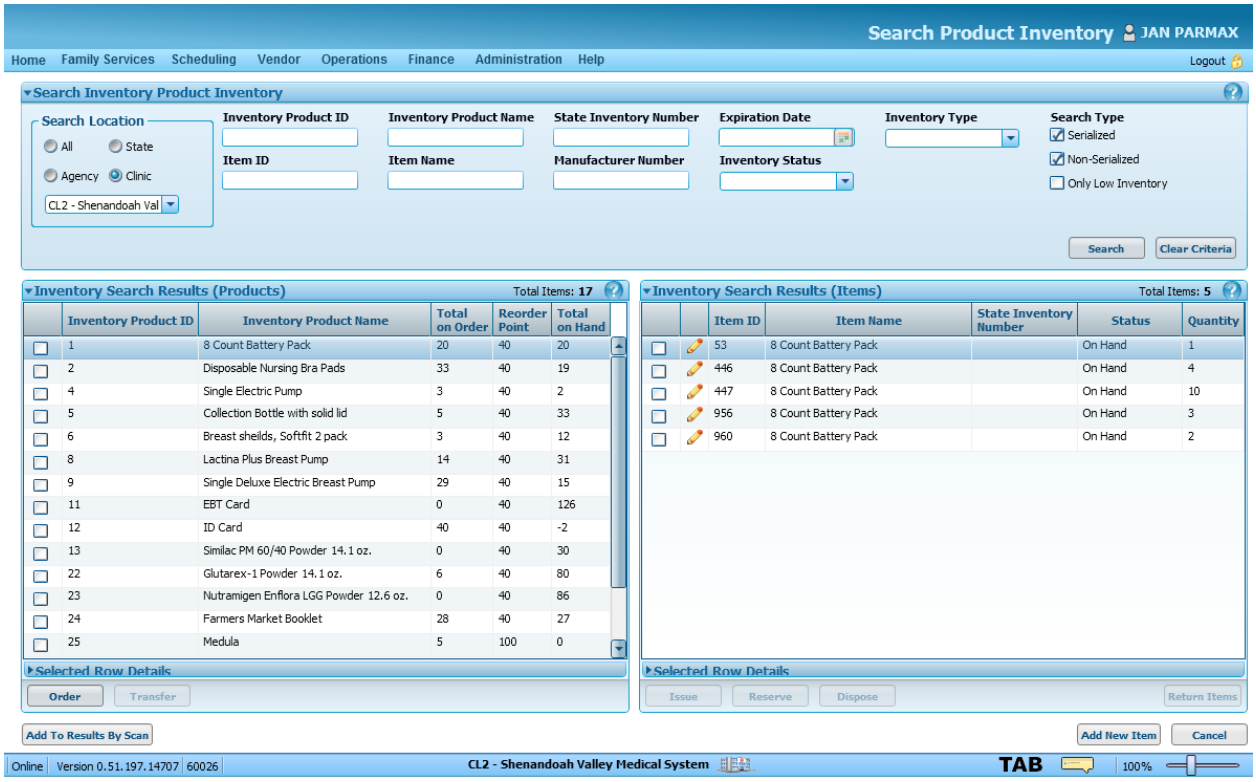
Selected Row Details

Issue | Reserve | Dispose | Return Items

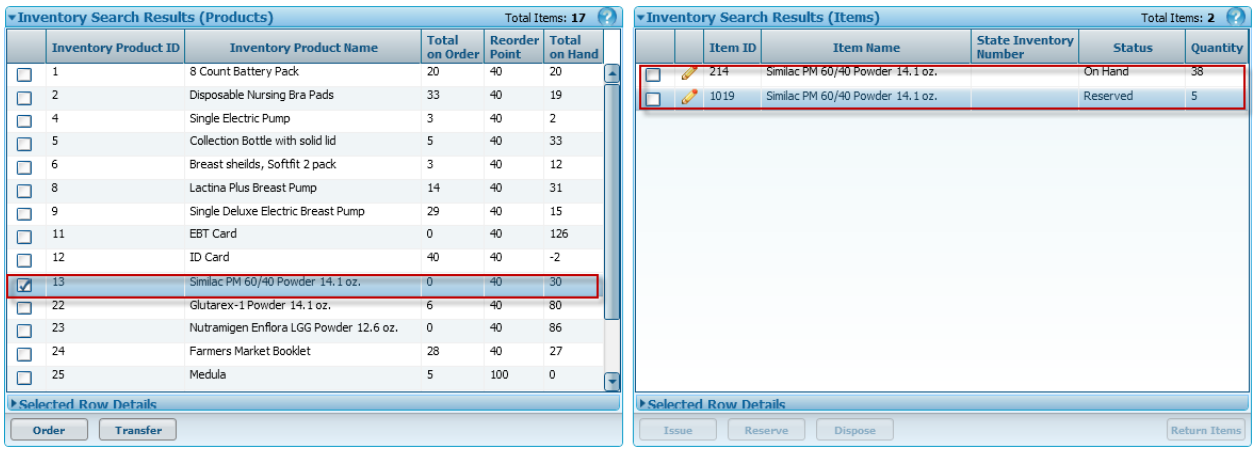
Task G. Disposing of Inventory

Complete the following steps to perform this task:

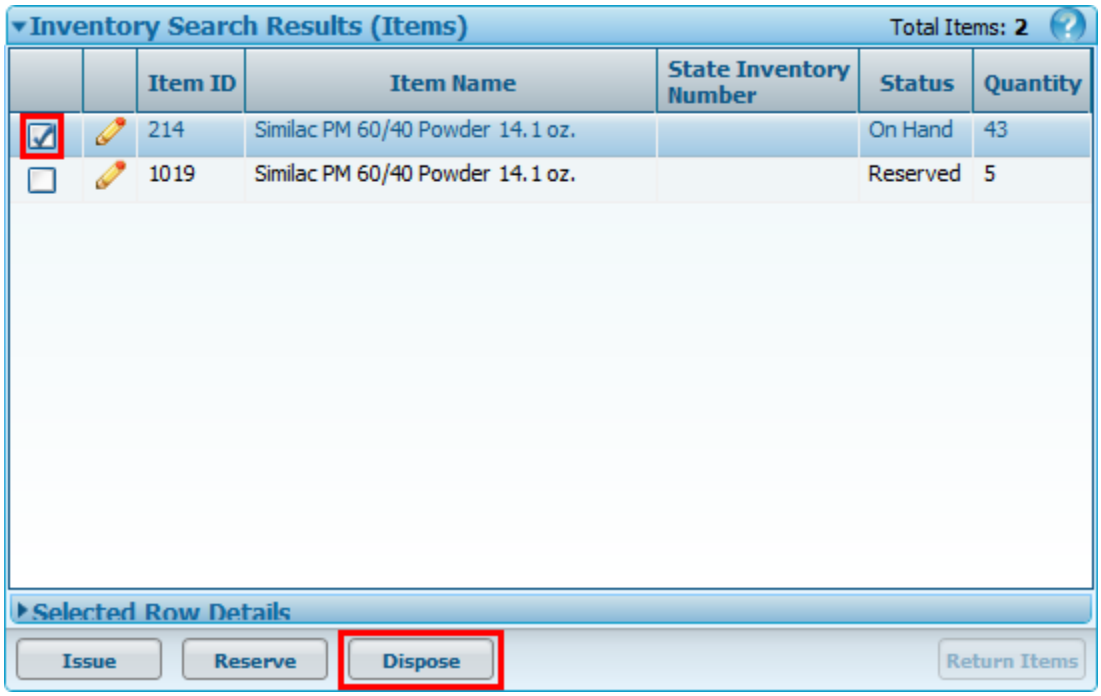
1. On the **Search Product Inventory** screen, perform a search if necessary.



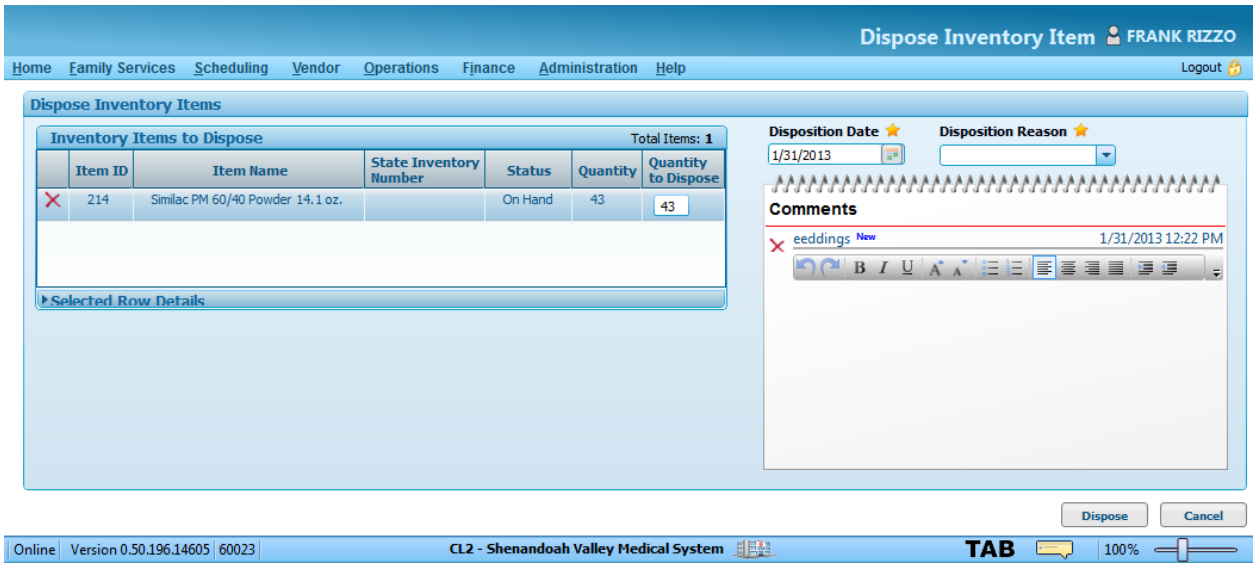
2. Double-click a product listed within the **Inventory Search Results (Products)** grid. The items associated to the selected product display in the **Inventory Search Results (Items)** grid.


Inventory Search Results (Products)
Total Items: 17
Inventory Product ID
Inventory Product Name
Total on Order
Reorder Point
Total on Hand
1 8 Count Battery Pack 20 40 20
2 Disposable Nursing Bra Pads 33 40 19
4 Single Electric Pump 3 40 2
5 Collection Bottle with solid lid 5 40 33
6 Breast sheilds, Softfit 2 pack 3 40 12
8 Lactina Plus Breast Pump 14 40 31
9 Single Deluxe Electric Breast Pump 29 40 15
11 EBT Card 0 40 126
12 ID Card 40 40 -2
13 Similac PM 60/40 Powder 14.1 oz. 0 40 30
22 Glutarex-1 Powder 14.1 oz. 6 40 80
23 Nutramigen Enflora LGG Powder 12.6 oz. 0 40 86
24 Farmers Market Booklet 28 40 27
25 Medula 5 100 0
Inventory Search Results (Items)
Total Items: 2
Item ID
Item Name
State Inventory Number
Status
Quantity
214 Similac PM 60/40 Powder 14.1 oz. On Hand 38
1019 Similac PM 60/40 Powder 14.1 oz. Reserved 5
Selected Row Details
Order
Transfer
Issue
Reserve
Dispose
Return Items

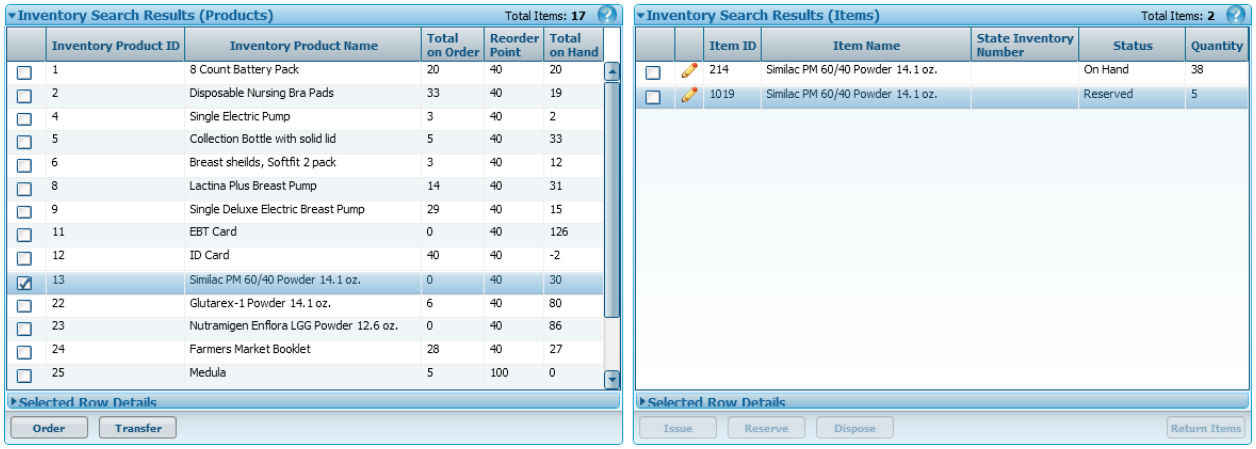
3. Select the check box associated to an item within the **Inventory Search Results (Items)** grid.



4. Click **Dispose**. The **Dispose Inventory Item** screen displays.



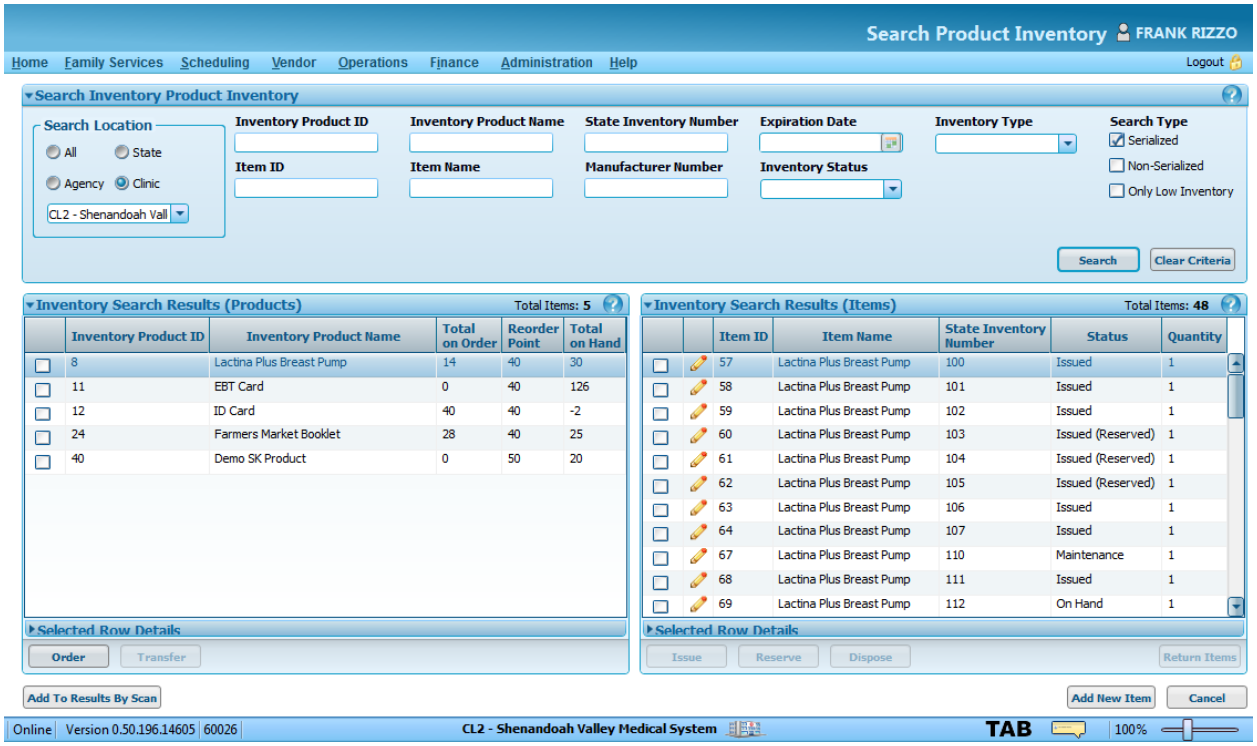
5. Update the quantity in the **Quantity to Dispose** column of the **Inventory Items to Reserve** grid as necessary.
6. Enter or select the **Disposition Date**.
7. Select the **Disposition Reason**.
8. Enter **Comments** as necessary.
9. Click **Dispose**. The **Search Product Inventory** screen refreshes and displays a status message indicating success. The **Inventory Search Results (Items)** grid refreshes and displays the updated "On Hand" **Quantity**.


Inventory Search Results (Products)
Total Items: 17
Inventory Product ID
Inventory Product Name
Total on Order
Reorder Point
Total on Hand
1 8 Count Battery Pack 20 40 20
2 Disposable Nursing Bra Pads 33 40 19
4 Single Electric Pump 3 40 2
5 Collection Bottle with solid lid 5 40 33
6 Breast sheilds, Softfit 2 pack 3 40 12
8 Lactina Plus Breast Pump 14 40 31
9 Single Deluxe Electric Breast Pump 29 40 15
11 EBT Card 0 40 126
12 ID Card 40 40 -2
13 Similac PM 60/40 Powder 14.1 oz. 0 40 30
22 Glutarex-1 Powder 14.1 oz. 6 40 80
23 Nutramigen Enflora LGG Powder 12.6 oz. 0 40 86
24 Farmers Market Booklet 28 40 27
25 Medula 5 100 0
Selected Row Details
Order
Transfer
Inventory Search Results (Items)
Total Items: 2
Item ID
Item Name
State Inventory Number
Status
Quantity
214 Similac PM 60/40 Powder 14.1 oz. On Hand 38
1019 Similac PM 60/40 Powder 14.1 oz. Reserved 5
Selected Row Details
Issue
Reserve
Dispose
Return Items

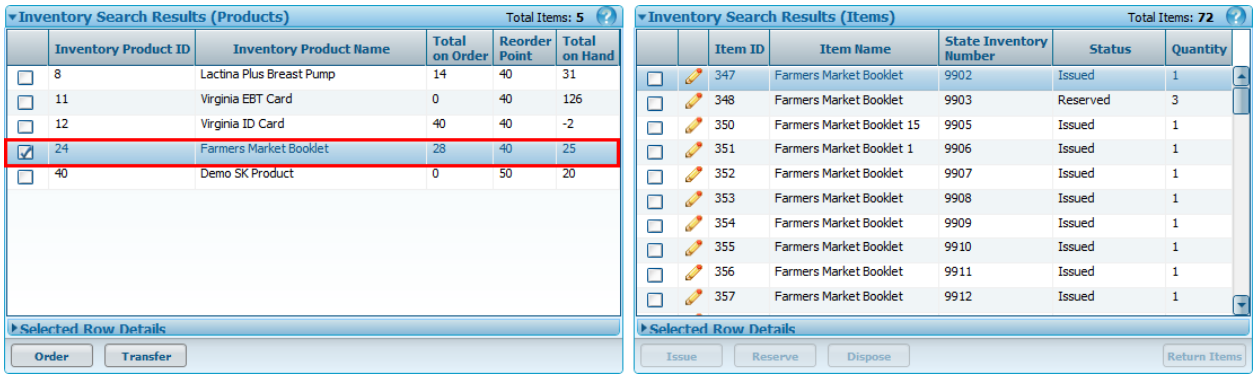
Task H. Returning Inventory

Complete the following steps to perform this task:

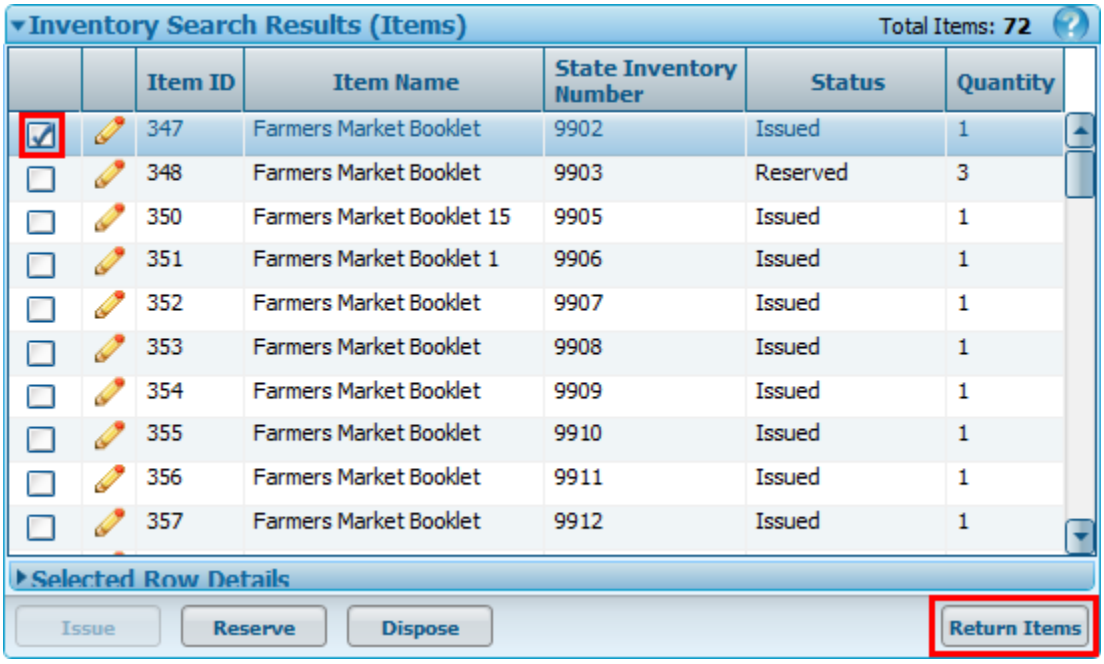
1. On the **Search Product Inventory** screen, perform a search if necessary.


Search Product Inventory
FRANK RIZZO
Home Family Services Scheduling Vendor Operations Finance Administration Help
Logout
Search Inventory Product Inventory
Search Location
All State
Agency Clinic
CL2 - Shenandoah Vall
Inventory Product ID
Inventory Product Name
State Inventory Number
Expiration Date
Inventory Type
Search Type
Serialized
Non-Serialized
Only Low Inventory
Item ID
Item Name
Manufacturer Number
Inventory Status
Search
Clear Criteria
Inventory Search Results (Products)
Total Items: 5
Inventory Product ID | Inventory Product Name | Total on Order | Reorder Point | Total on Hand
8 | Lactina Plus Breast Pump | 14 | 40 | 30
11 | EBT Card | 0 | 40 | 126
12 | ID Card | 40 | 40 | -2
24 | Farmers Market Booklet | 28 | 40 | 25
40 | Demo SK Product | 0 | 50 | 20
Inventory Search Results (Items)
Total Items: 48
Item ID | Item Name | State Inventory Number | Status | Quantity
57 | Lactina Plus Breast Pump | 100 | Issued | 1
58 | Lactina Plus Breast Pump | 101 | Issued | 1
59 | Lactina Plus Breast Pump | 102 | Issued | 1
60 | Lactina Plus Breast Pump | 103 | Issued (Reserved) | 1
61 | Lactina Plus Breast Pump | 104 | Issued (Reserved) | 1
62 | Lactina Plus Breast Pump | 105 | Issued (Reserved) | 1
63 | Lactina Plus Breast Pump | 106 | Issued | 1
64 | Lactina Plus Breast Pump | 107 | Issued | 1
67 | Lactina Plus Breast Pump | 110 | Maintenance | 1
68 | Lactina Plus Breast Pump | 111 | Issued | 1
69 | Lactina Plus Breast Pump | 112 | On Hand | 1
Selected Row Details
Order
Transfer
Issue
Reserve
Dispose
Return Items
Add To Results By Scan
Add New Item
Cancel
Online
Version 0.50.196.14605
60026
CL2 - Shenandoah Valley Medical System
TAB
100%

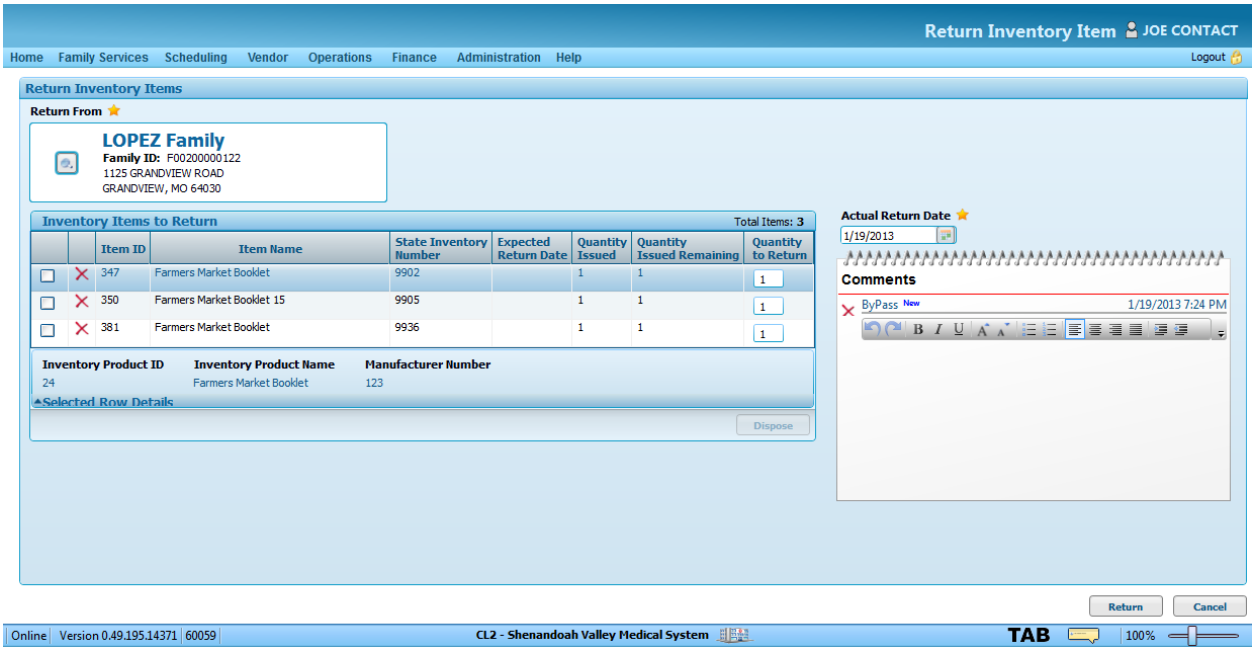
2. Double-click a product listed within the **Inventory Search Results (Products)** grid. The items associated to the selected product display in the **Inventory Search Results (Items)** grid.


Inventory Search Results (Products)
Total Items: 5
Inventory Product ID | Inventory Product Name | Total on Order | Reorder Point | Total on Hand
8 | Lactina Plus Breast Pump | 14 | 40 | 31
11 | Virginia EBT Card | 0 | 40 | 126
12 | Virginia ID Card | 40 | 40 | -2
24 | Farmers Market Booklet | 28 | 40 | 25
40 | Demo SK Product | 0 | 50 | 20
Inventory Search Results (Items)
Total Items: 72
Item ID | Item Name | State Inventory Number | Status | Quantity
347 | Farmers Market Booklet | 9902 | Issued | 1
348 | Farmers Market Booklet | 9903 | Reserved | 3
350 | Farmers Market Booklet 15 | 9905 | Issued | 1
351 | Farmers Market Booklet 1 | 9906 | Issued | 1
352 | Farmers Market Booklet | 9907 | Issued | 1
353 | Farmers Market Booklet | 9908 | Issued | 1
354 | Farmers Market Booklet | 9909 | Issued | 1
355 | Farmers Market Booklet | 9910 | Issued | 1
356 | Farmers Market Booklet | 9911 | Issued | 1
357 | Farmers Market Booklet | 9912 | Issued | 1
Selected Row Details
Order
Transfer
Issue
Reserve
Dispose
Return Items

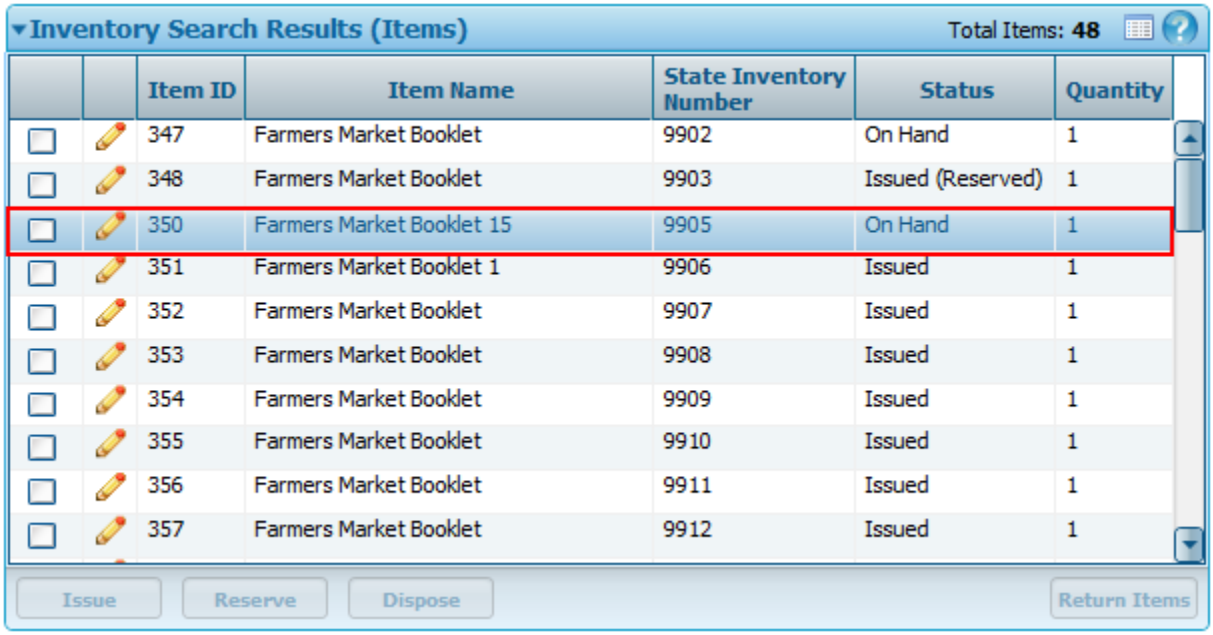
3. Select the check box associated to an "Issued" item within the **Inventory Search Results (Items)** grid.


Inventory Search Results (Items)
Total Items: 72
Item ID
Item Name
State Inventory Number
Status
Quantity
347 Farmers Market Booklet 9902 Issued 1
348 Farmers Market Booklet 9903 Reserved 3
350 Farmers Market Booklet 15 9905 Issued 1
351 Farmers Market Booklet 1 9906 Issued 1
352 Farmers Market Booklet 9907 Issued 1
353 Farmers Market Booklet 9908 Issued 1
354 Farmers Market Booklet 9909 Issued 1
355 Farmers Market Booklet 9910 Issued 1
356 Farmers Market Booklet 9911 Issued 1
357 Farmers Market Booklet 9912 Issued 1
Selected Row Details
Issue
Reserve
Dispose
Return Items

4. Click **Return Items**. The **Return Inventory Item** screen displays.



5. Update the quantity in the **Quantity to Return** column of the **Inventory Items to Return** grid as necessary.
6. Enter or select the **Actual Return Date**.
7. Enter **Comments** as necessary.
8. Click **Return**. The **Search Product Inventory** screen refreshes and displays a status message indicating success. The **Inventory Search Results (Items)** grid refreshes and the **Status** of the returned item is updated to "On Hand".


Inventory Search Results (Items)
Total Items: 48
Item ID
Item Name
State Inventory Number
Status
Quantity
347 Farmers Market Booklet 9902 On Hand 1
348 Farmers Market Booklet 9903 Issued (Reserved) 1
350 Farmers Market Booklet 15 9905 On Hand 1
351 Farmers Market Booklet 1 9906 Issued 1
352 Farmers Market Booklet 9907 Issued 1
353 Farmers Market Booklet 9908 Issued 1
354 Farmers Market Booklet 9909 Issued 1
355 Farmers Market Booklet 9910 Issued 1
356 Farmers Market Booklet 9911 Issued 1
357 Farmers Market Booklet 9912 Issued 1
Issue
Reserve
Dispose
Return Items

Congratulations!

You have successfully completed the **Search Product Inventory** process.

Search Orders and Transfer Requests

The process of requesting inventory to be transferred from one location to another is handled in the scenario on Maintaining Inventory. This process is not complete without the ability to approve transfers. The **Maintain Transfer Requests** menu item displays the **Search Inventory Requests** screen that provides the ability to approve and transfer inventory items that have been requested for transfer previously.

The **Search Inventory Requests** screen also can be used to perform the following actions that have been described in the maintain inventory scenario: perform inventory and product searches; add new products; add new items; close out inventory items.

This process includes the following tasks:

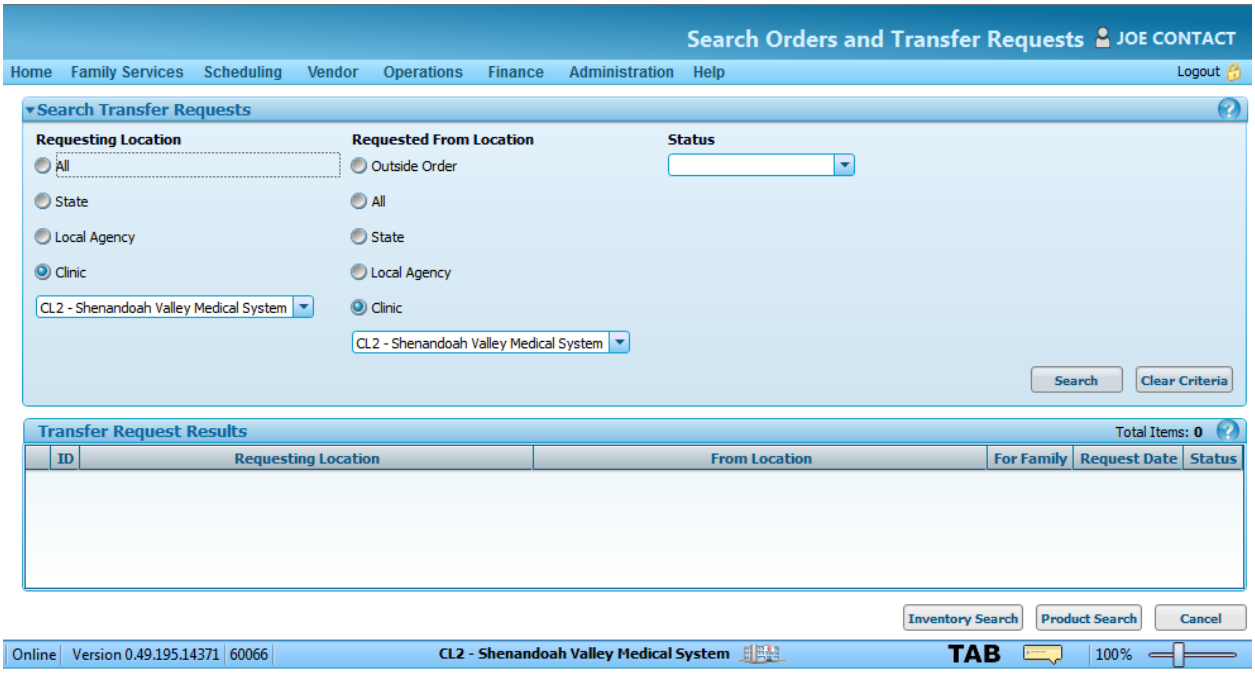
Task A. Search and Locate the Transfer Request 9-34

Task B. Approve or Disapprove the Transfer Request 9-36

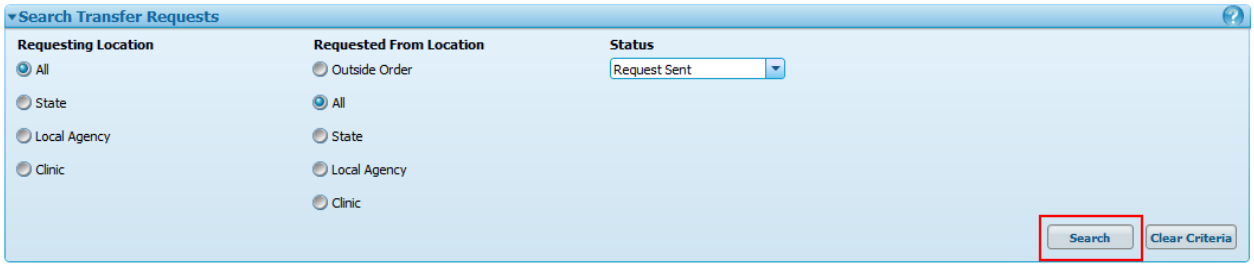
Task A. Search and Locate the Transfer Request

Complete the following steps to perform this task:

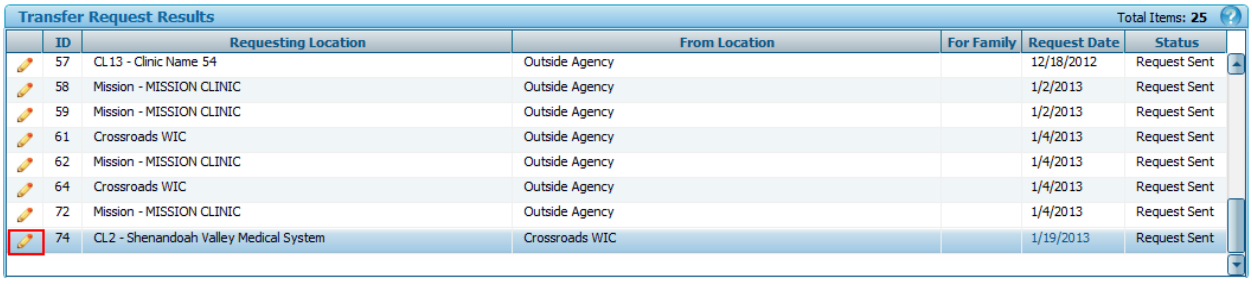
1. From the **Home** screen, go to **Operations → Inventory →Search Orders and Transfer Requests**. The **Search Orders and Transfer Requests** screen displays.



2. Select one of the following for the **Requesting Location** (select the specific location from the drop-down list).
   - **All**
   - **State**
   - **Local Agency**
   - **Clinic**
3. Select one of the following for the **Requested From Location** (select the specific location from the drop-down list).
   - **Outside Order**
   - **All**
   - **State**
   - **Local Agency**
   - **Clinic**
4. Select one of the following for the **Status** (Leaving this field blank will return all request)
   - Request New
   - Request Sent
   - Request Fulfilled
   - Request Closed



5. Click **Search**. The results are shown in the **Inventory Request Results** grid.

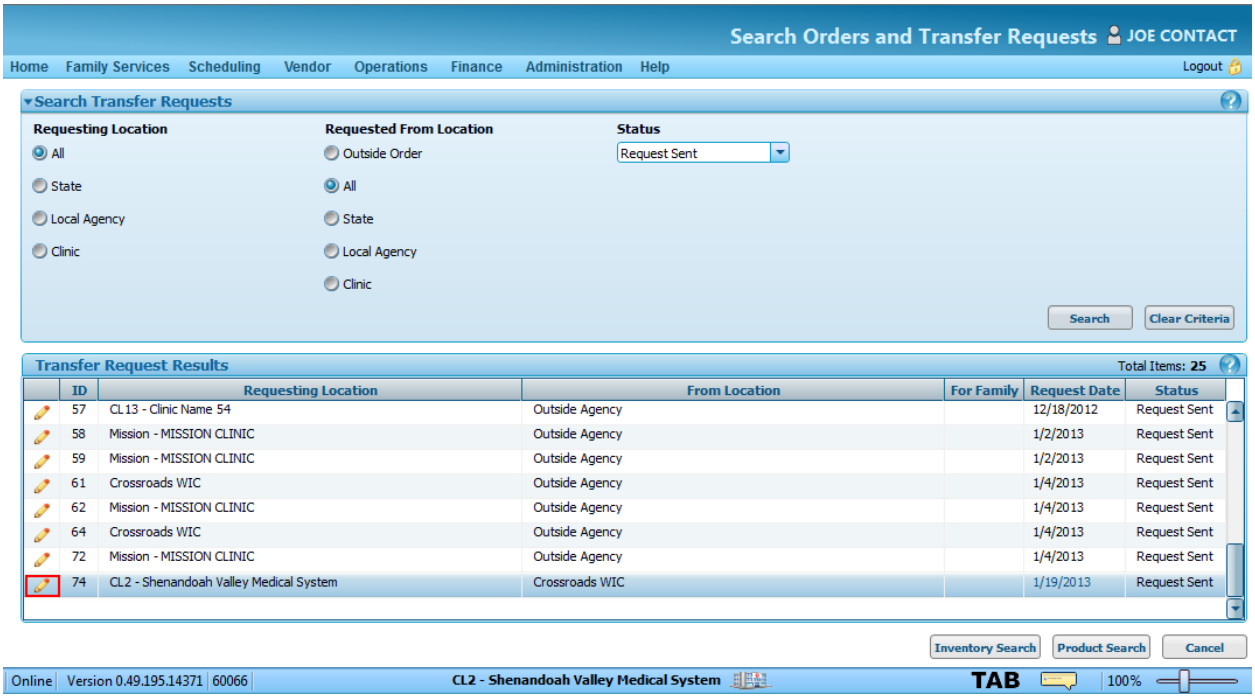

Transfer Request Results
Total Items: 25
ID
Requesting Location
From Location
For Family
Request Date
Status
57 CL13 - Clinic Name 54 Outside Agency 12/18/2012 Request Sent
58 Mission - MISSION CLINIC Outside Agency 1/2/2013 Request Sent
59 Mission - MISSION CLINIC Outside Agency 1/2/2013 Request Sent
61 Crossroads WIC Outside Agency 1/4/2013 Request Sent
62 Mission - MISSION CLINIC Outside Agency 1/4/2013 Request Sent
64 Crossroads WIC Outside Agency 1/4/2013 Request Sent
72 Mission - MISSION CLINIC Outside Agency 1/4/2013 Request Sent
74 CL2 - Shenandoah Valley Medical System Crossroads WIC 1/19/2013 Request Sent

The Search Inventory Requests screen allows users to search for currently pending transfers or orders and process them appropriately. In the Inventory Request Results grid, the inventory order details are seen by clicking the Edit button ( ) in the grid.

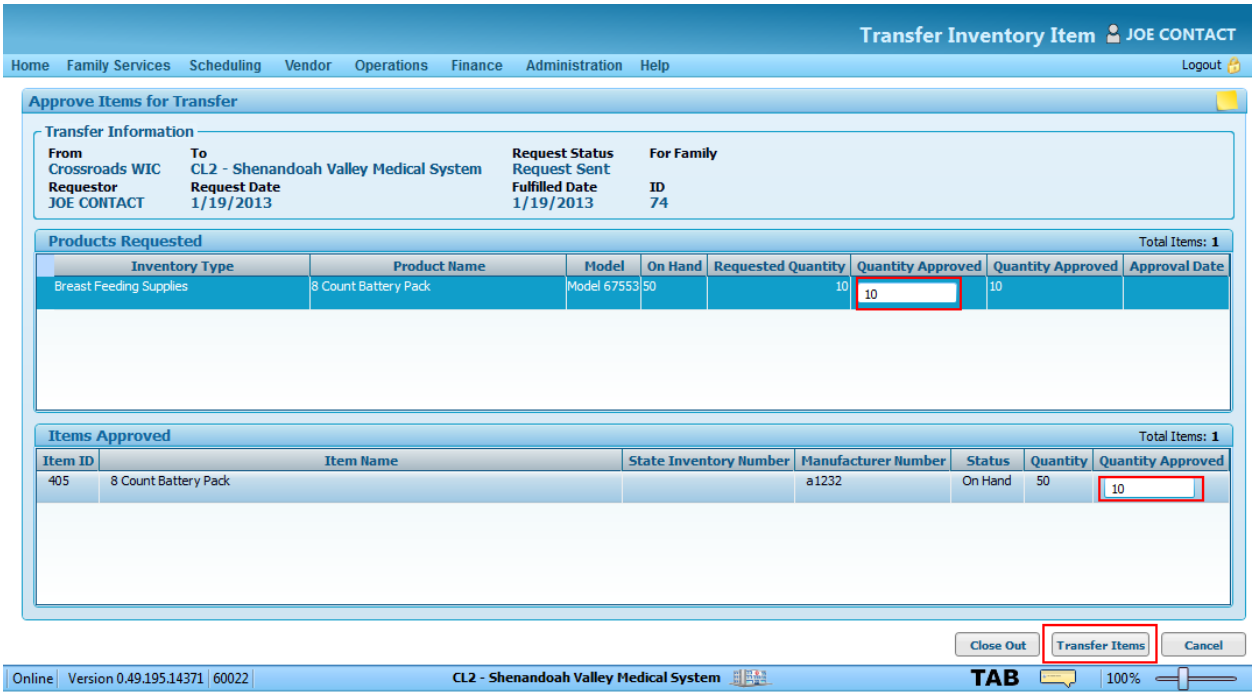
Task B. Approve or Disapprove the Transfer Request

Complete the following steps to perform this task:

1. From the **Search Orders and Transfer Requests** screen, click the **Edit** button ( ) to show the details of the requested transfer.



2. Under **Products Requested**, enter the **Quantity Approved** to be transferred.
3. Under **Items Approved**, enter the **Quantity Approved**.
4. Click the **Transfer Items** button. A status message displays the transfer was successful.



Congratulations!

You have successfully completed the **Search Orders and Transfer Requests** process.

MCH Product Inventory

This scenario explains the process of viewing a list of products that are currently in-stock with MCH.

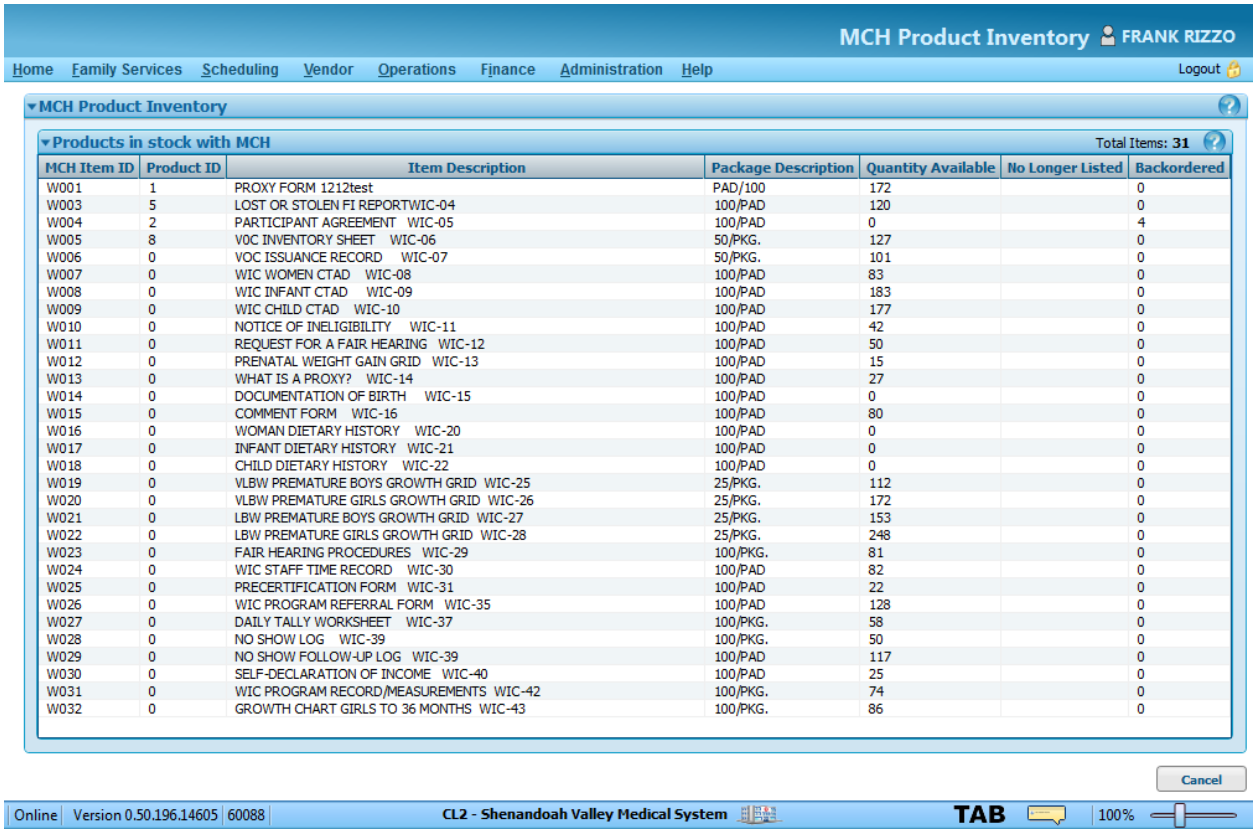
This process includes the following tasks:

Task A. View the MCH Product Inventory 9-39

Task A. View the MCH Product Inventory

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → Inventory → MCH Product Inventory**. The **MCH Product Inventory** screen displays.



MCH Item ID	Product ID	Item Description	Package Description	Quantity Available	No Longer Listed	Backordered
W001	1	PROXY FORM 1212test	PAD/100	172		0
W003	5	LOST OR STOLEN FI REPORTWIC-04	100/PAD	120		0
W004	2	PARTICIPANT AGREEMENT WIC-05	100/PAD	0		4
W005	8	V0C INVENTORY SHEET WIC-06	50/PKG.	127		0
W006	0	VOC ISSUANCE RECORD WIC-07	50/PKG.	101		0
W007	0	WIC WOMEN CTAD WIC-08	100/PAD	83		0
W008	0	WIC INFANT CTAD WIC-09	100/PAD	183		0
W009	0	WIC CHILD CTAD WIC-10	100/PAD	177		0
W010	0	NOTICE OF INELIGIBILITY WIC-11	100/PAD	42		0
W011	0	REQUEST FOR A FAIR HEARING WIC-12	100/PAD	50		0
W012	0	PRENATAL WEIGHT GAIN GRID WIC-13	100/PAD	15		0
W013	0	WHAT IS A PROXY? WIC-14	100/PAD	27		0
W014	0	DOCUMENTATION OF BIRTH WIC-15	100/PAD	0		0
W015	0	COMMENT FORM WIC-16	100/PAD	80		0
W016	0	WOMAN DIETARY HISTORY WIC-20	100/PAD	0		0
W017	0	INFANT DIETARY HISTORY WIC-21	100/PAD	0		0
W018	0	CHILD DIETARY HISTORY WIC-22	100/PAD	0		0
W019	0	VLBW PREMATURE BOYS GROWTH GRID WIC-25	25/PKG.	112		0
W020	0	VLBW PREMATURE GIRLS GROWTH GRID WIC-26	25/PKG.	172		0
W021	0	LBW PREMATURE BOYS GROWTH GRID WIC-27	25/PKG.	153		0
W022	0	LBW PREMATURE GIRLS GROWTH GRID WIC-28	25/PKG.	248		0
W023	0	FAIR HEARING PROCEDURES WIC-29	100/PKG.	81		0
W024	0	WIC STAFF TIME RECORD WIC-30	100/PAD	82		0
W025	0	PRECERTIFICATION FORM WIC-31	100/PAD	22		0
W026	0	WIC PROGRAM REFERRAL FORM WIC-35	100/PAD	128		0
W027	0	DAILY TALLY WORKSHEET WIC-37	100/PKG.	58		0
W028	0	NO SHOW LOG WIC-39	100/PKG.	50		0
W029	0	NO SHOW FOLLOW-UP LOG WIC-39	100/PAD	117		0
W030	0	SELF-DECLARATION OF INCOME WIC-40	100/PAD	25		0
W031	0	WIC PROGRAM RECORD/MEASUREMENTS WIC-42	100/PKG.	74		0
W032	0	GROWTH CHART GIRLS TO 36 MONTHS WIC-43	100/PKG.	86		0

The Products in stock with MCH grid displays the MCH Item ID, Product ID, Item Description, Package Description, Quantity Available, No Longer Listed, and Backordered for each MCH product as the default.

Click a column header to sort the items in the grid. Click and hold, then drag and drop columns of information to reorganize the order of the columns in the grid.

2. View the list of products displayed in the **Products in stock with MCH** grid.

Congratulations!

You have successfully completed the **MCH Product Inventory** process.

Maintain Products

This scenario explains the process of searching for products, adding products, and editing products.

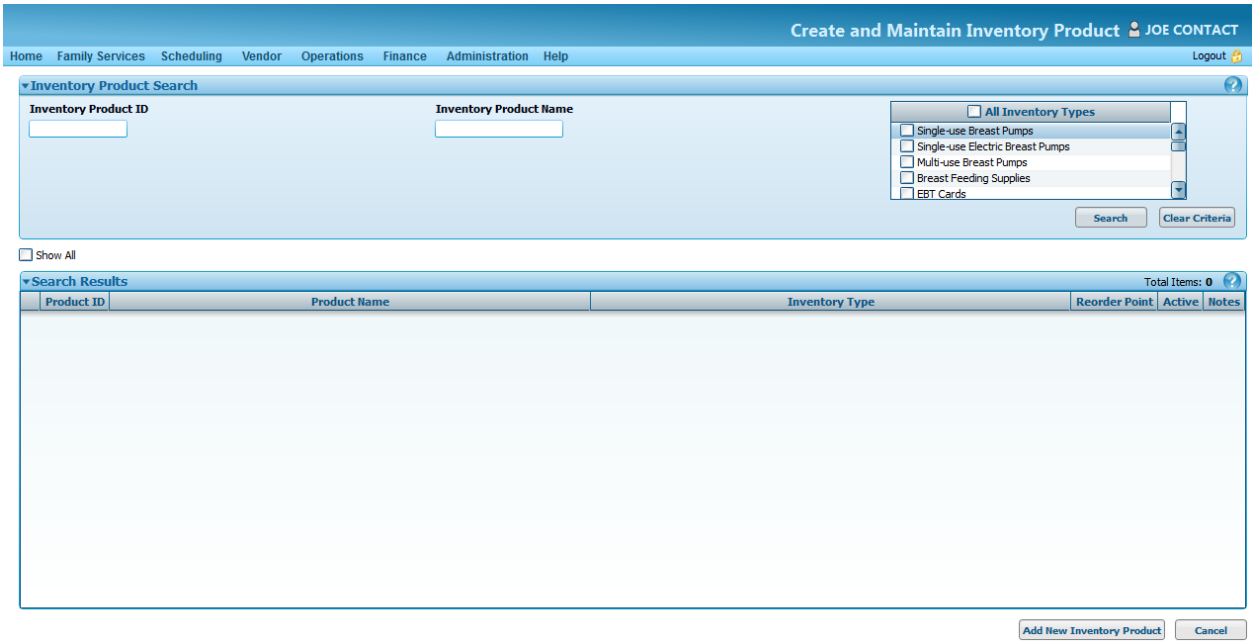
This process includes the following tasks:

Task A. Searching for Products..... 9-41
Task B. Adding Products 9-43
Task C. Editing Products 9-46

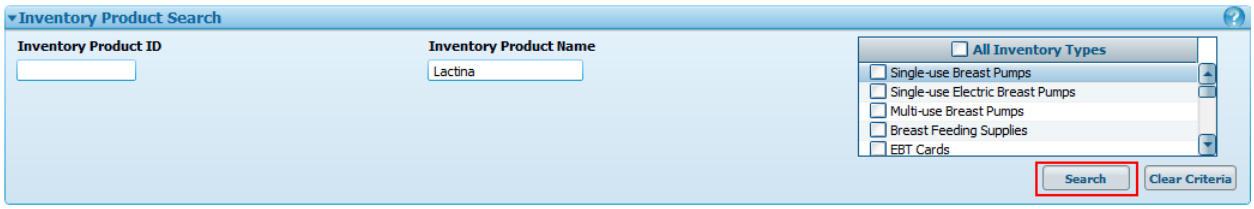
Task A. Searching for Products

Complete the following steps to perform this task:

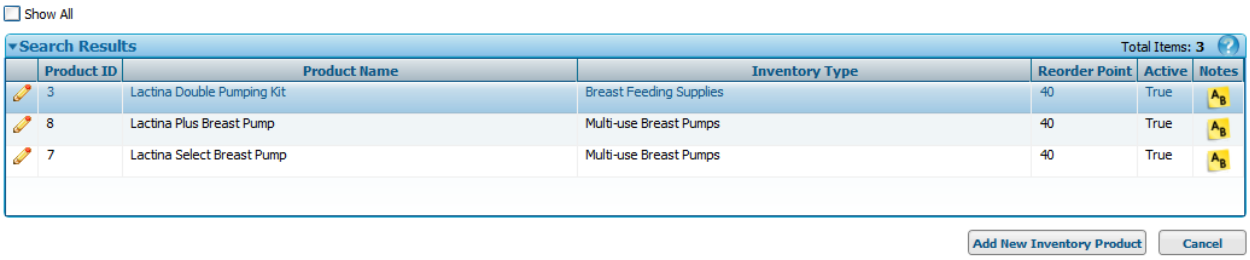
1. From the **Home** screen, go to **Operations → Inventory → Maintain Products**. The **Create and Maintain Inventory Product** screen displays.



2. Complete one or more of the following:
   - Enter an **Inventory Product ID**.
   - Enter an **Inventory Product Name**.
   - Select one or more **Inventory Types**.



3. Click **Search**. The **Search Results** grid displays the results of the search.



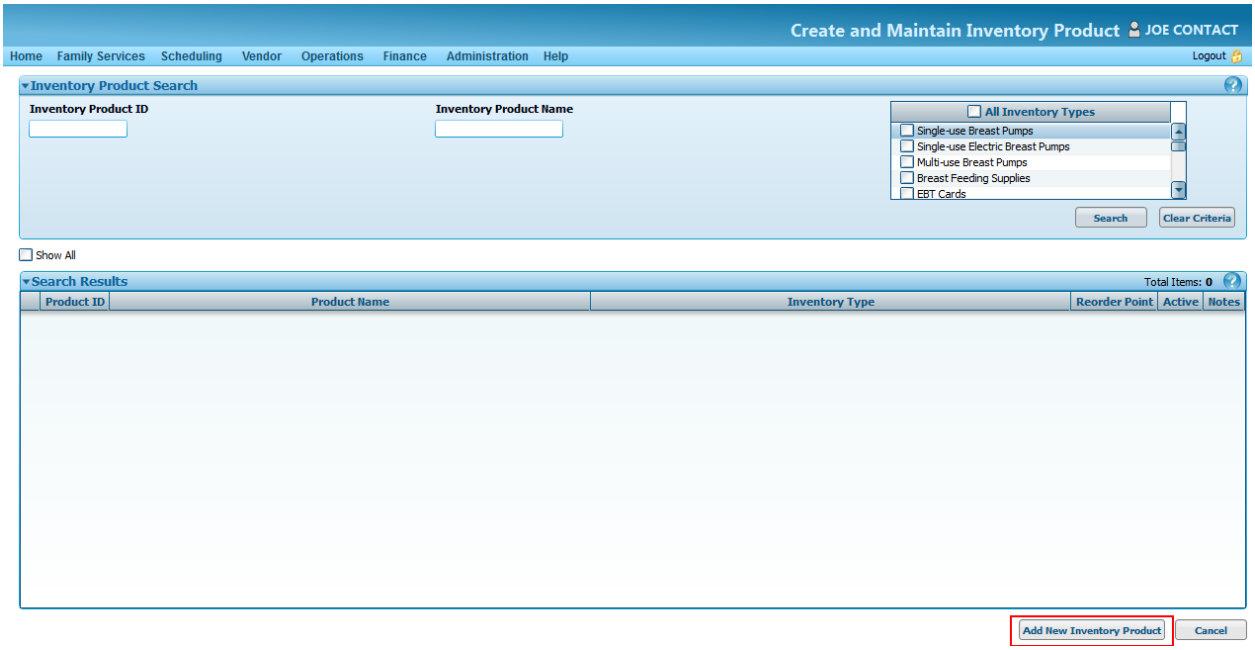
Click Show All to display both Active and Inactive products within the grid.

Click the Edit button ( ) to view details of the selected product.

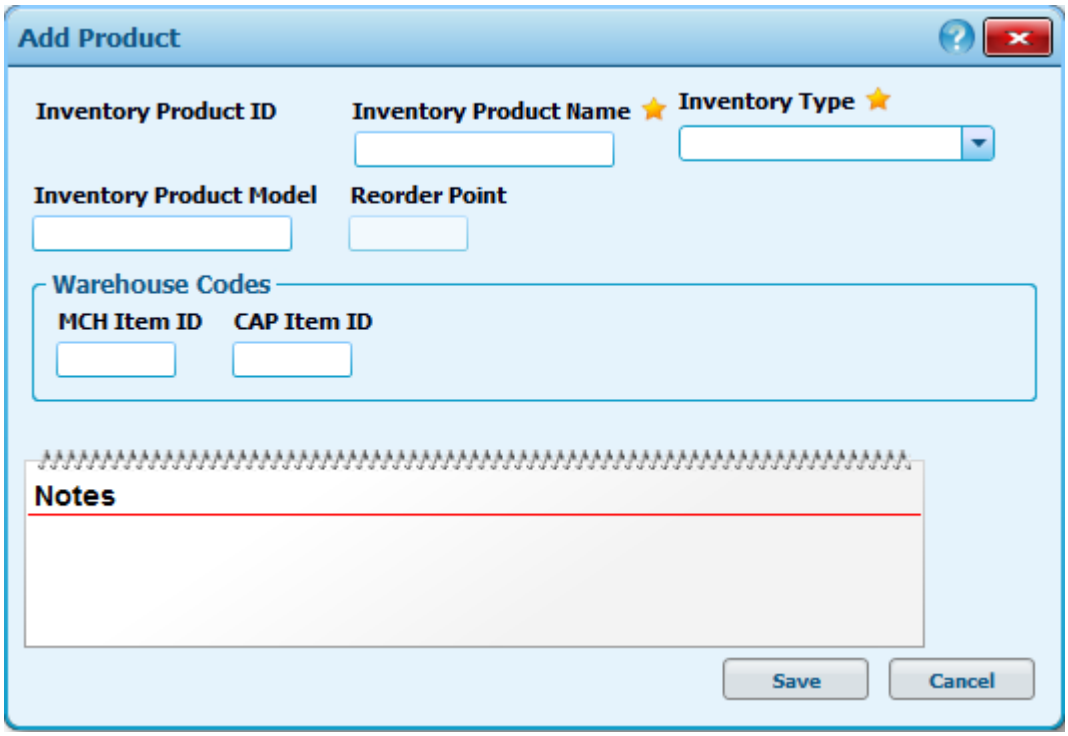
Task B. Adding Products

Complete the following steps to perform this task:

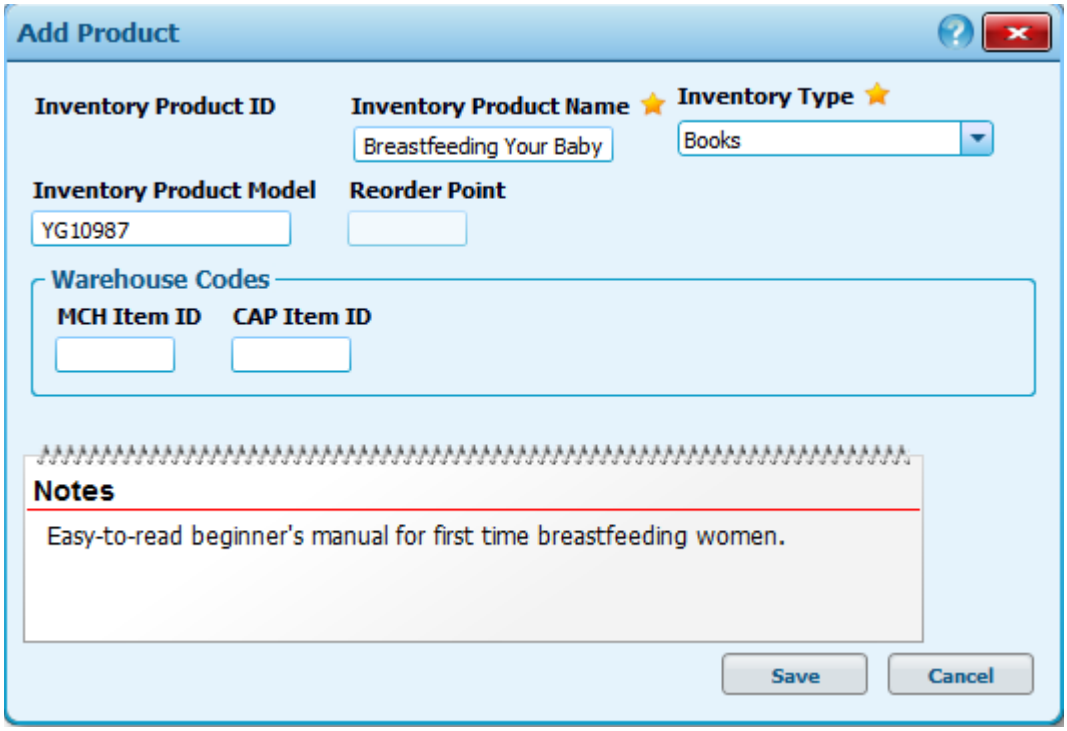
1. From the **Home** screen, go to **Operations → Inventory → Maintain Products**. The **Create and Maintain Inventory Product** screen displays.



2. Click **Add New Inventory Product**. The **Add Product** screen displays.



3. Enter the **Inventory Product Name**.
4. Select an **Inventory Type**.
5. Enter an **Inventory Product Model**.
6. Enter a **MCH Item ID**, if necessary.
7. Enter a **CAP Item ID**, if necessary.
8. Enter **Notes**, if necessary.



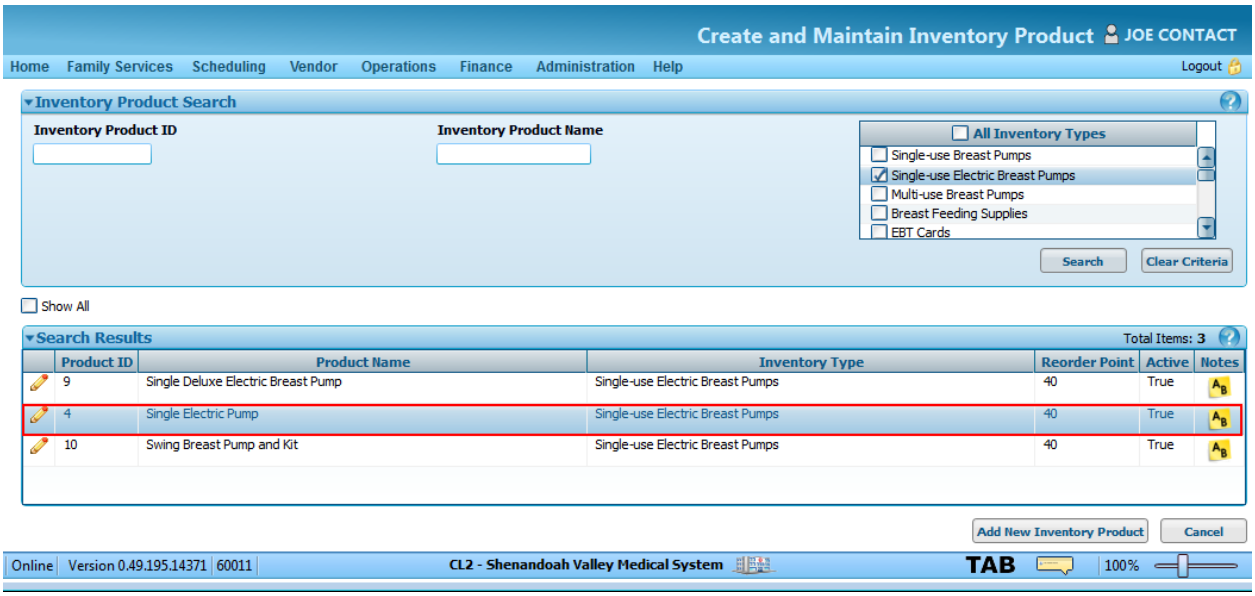
9. Click **Save**. A status message displays indicating success and you are returned to the **Create and Maintain Inventory Product** screen.

A system generated Inventory Product ID will be assigned to the newly added product.

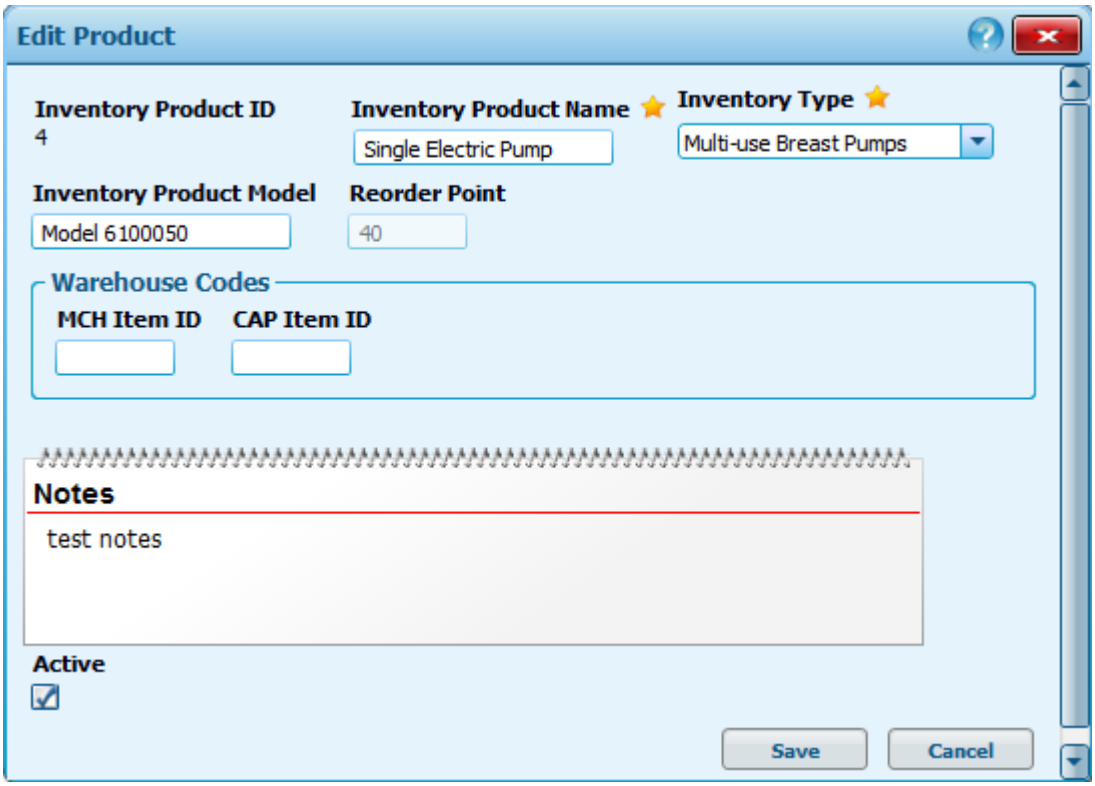
Task C. Editing Products

Complete the following steps to perform this task:

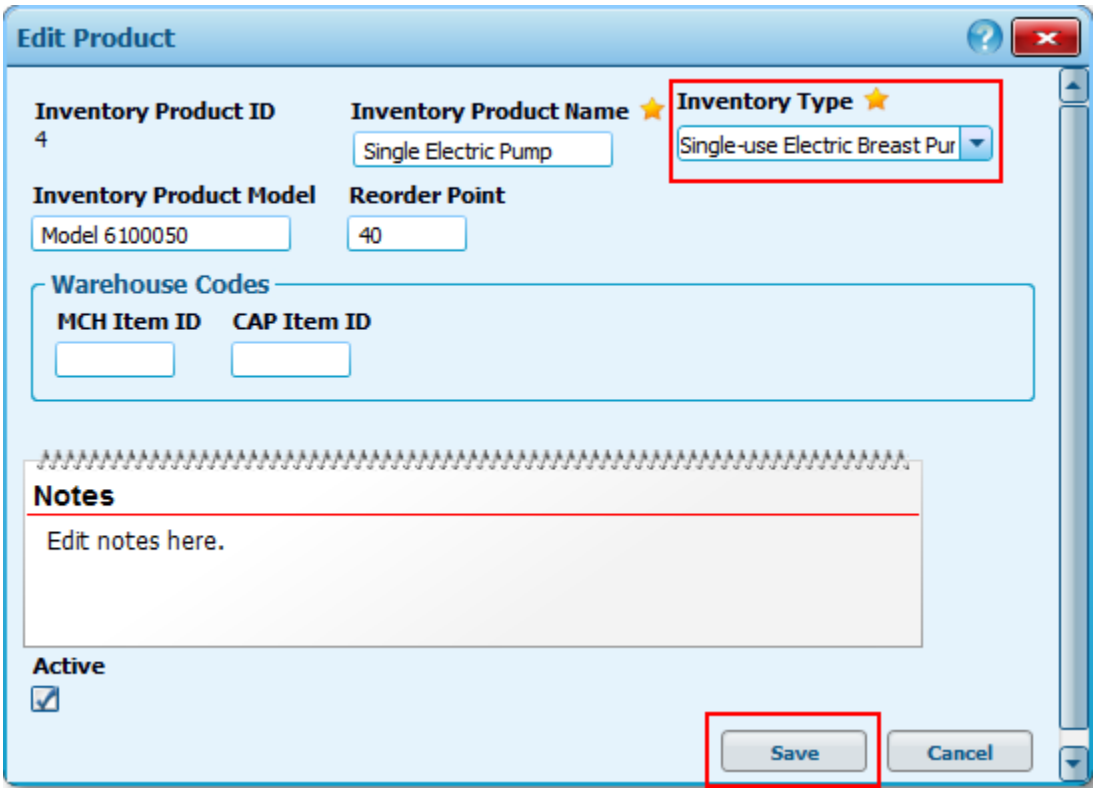
1. From the **Home** screen, go to **Operations → Inventory → Maintain Products**. The **Create and Maintain Inventory Product** screen displays.
2. Conduct a product search. The **Search Results** grid displays the results of the search.



3. Click the **Edit** button ( ). The **Edit Product** screen displays.



4. Edit the selected product information, as necessary.



5. Click **Save**. A status message displays indicating success and you are returned to the **Create and Maintain Inventory Product** screen.

Congratulations!

You have successfully completed the **Maintain Products** process.

Maintain Types

This scenario explains the process of adding and editing inventory types.

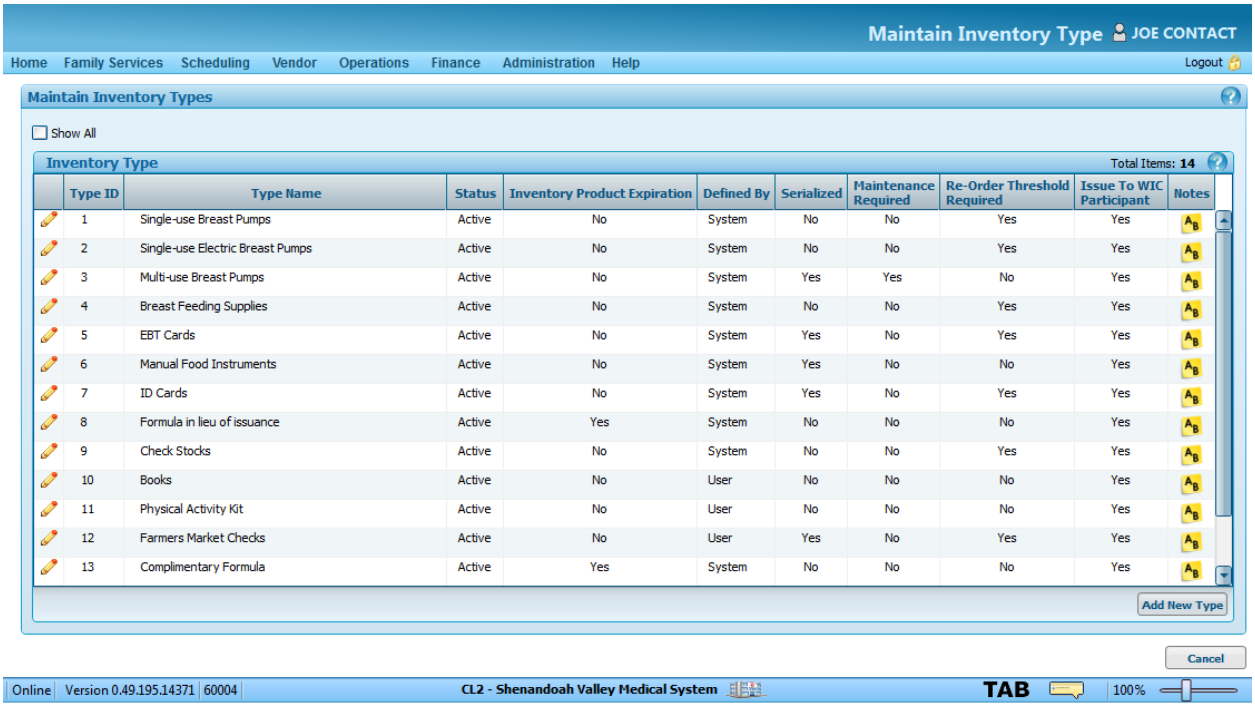
This process includes the following tasks:

Task A. Adding an Inventory Type 9-50
Task B. Editing an Inventory Type 9-53

Task A. Adding an Inventory Type

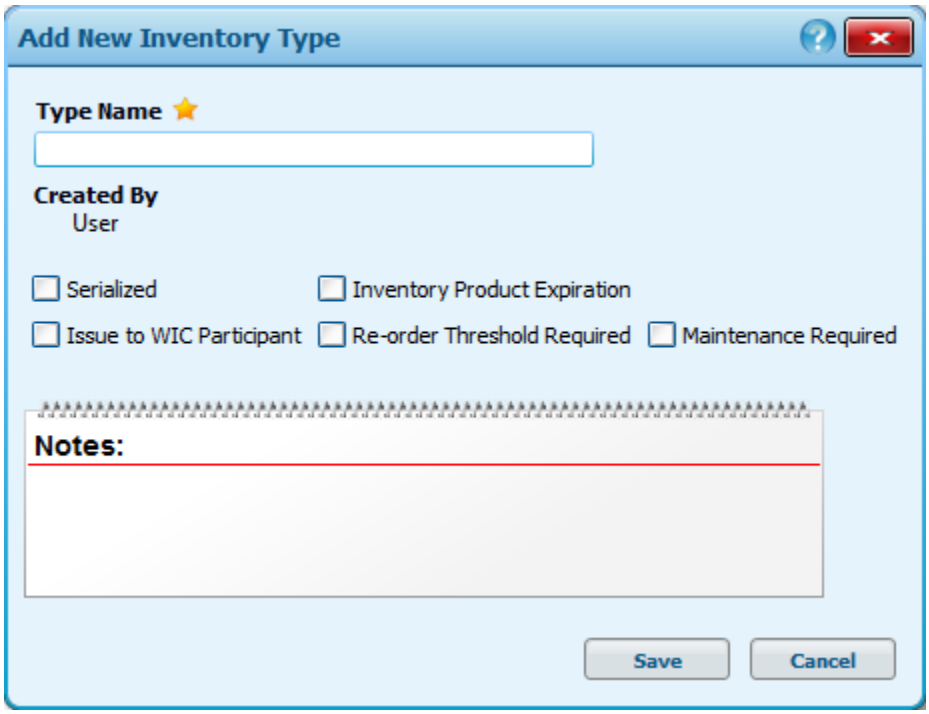
Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → Inventory → Maintain Types**. The **Maintain Inventory Type** screen displays.

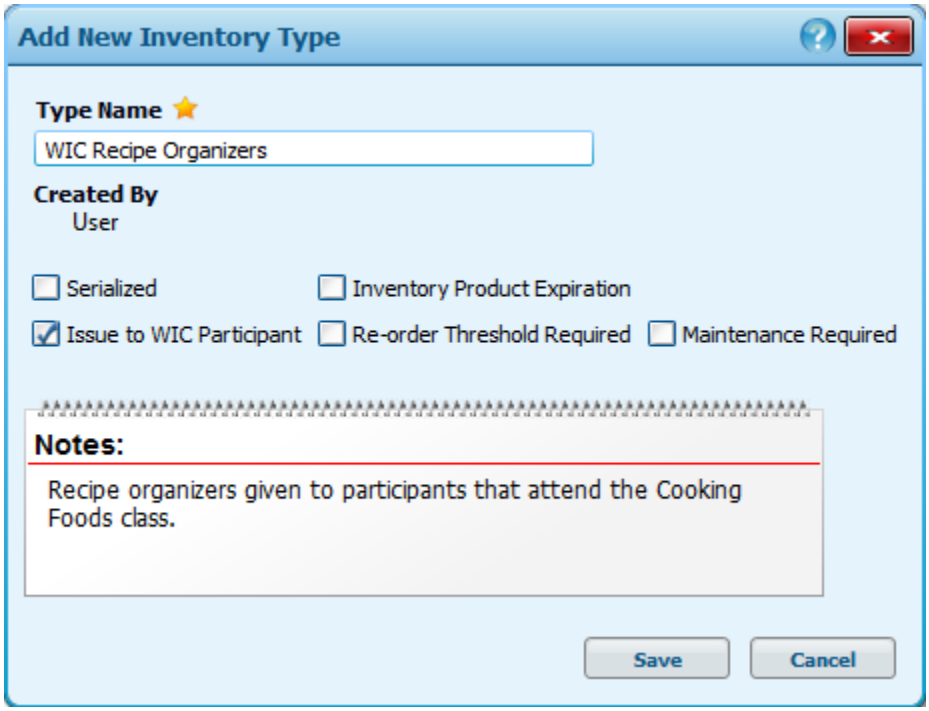

Maintain Inventory Type
JOE CONTACT
Home
Family Services
Scheduling
Vendor
Operations
Finance
Administration
Help
Logout
Maintain Inventory Types
Show All
Inventory Type
Total Items: 14
Type ID
Type Name
Status
Inventory Product Expiration
Defined By
Serialized
Maintenance Required
Re-Order Threshold Required
Issue To WIC Participant
Notes
1 Single-use Breast Pumps Active No System No No Yes Yes
2 Single-use Electric Breast Pumps Active No System No No Yes Yes
3 Multi-use Breast Pumps Active No System Yes Yes No Yes
4 Breast Feeding Supplies Active No System No No Yes Yes
5 EBT Cards Active No System Yes No Yes Yes
6 Manual Food Instruments Active No System Yes No No Yes
7 ID Cards Active No System Yes No Yes Yes
8 Formula in lieu of issuance Active Yes System No No No Yes
9 Check Stocks Active No System No No Yes Yes
10 Books Active No User No No No Yes
11 Physical Activity Kit Active No User No No No Yes
12 Farmers Market Checks Active No User Yes No Yes Yes
13 Complimentary Formula Active Yes System No No No Yes
Add New Type
Cancel
Online
Version 0.49.195.14371
60004
CL2 - Shenandoah Valley Medical System
TAB
100%

The Inventory Type grid displays a list of all active inventory types. Click Show All to display both Active and Inactive inventory types within the grid.

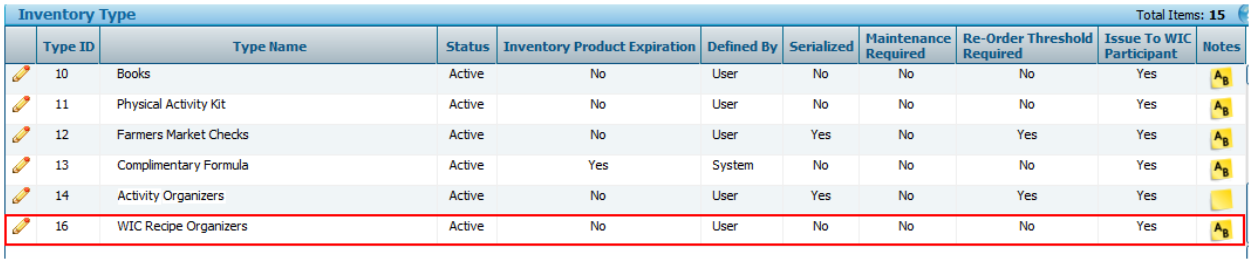
2. Click **Add New Type**. The **Add New Inventory Type** screen displays.



3. Enter an inventory **Type Name**.
4. Select one or more of the following inventory type options:
   - **Serialized**
   - **Product Expiration**
   - **Issue to WIC Participant**
   - **Re-order Threshold Required**
   - **Maintenance Required**



5. Click **Save**. A status message displays indicating success. You are returned to the **Maintain Inventory Type** screen and the newly added inventory type is added to the grid.



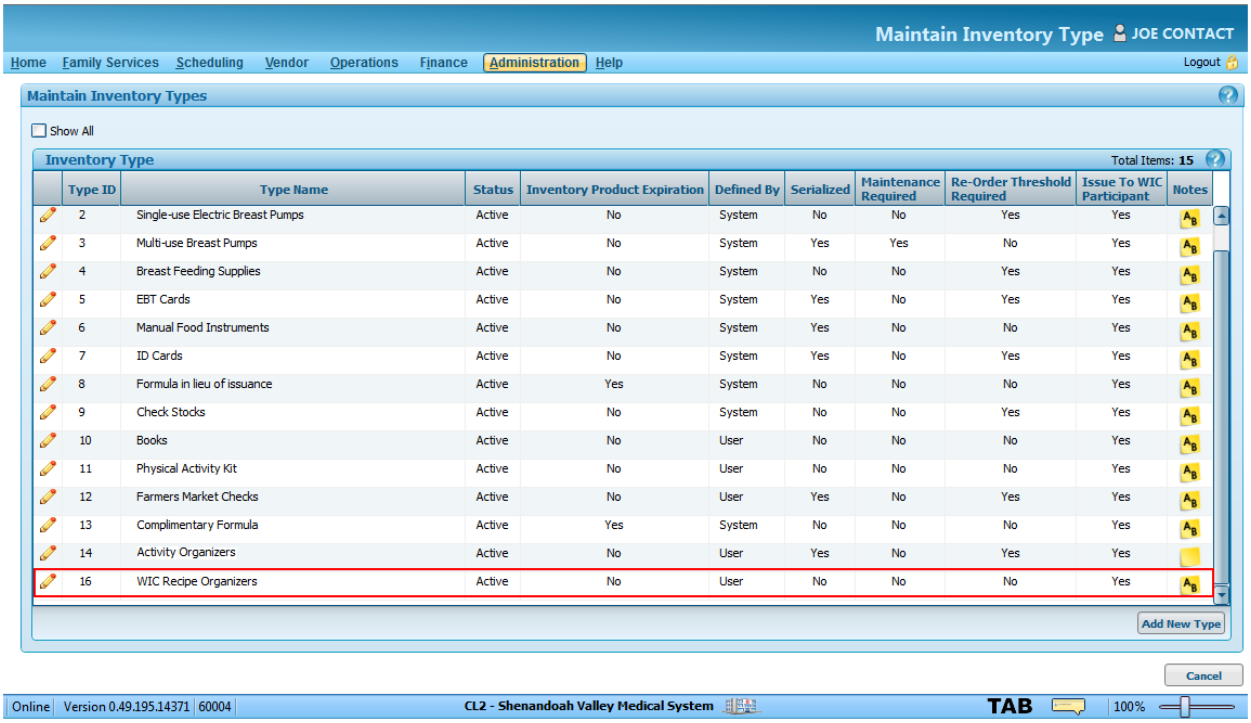
Type ID	Type Name	Status	Inventory Product Expiration	Defined By	Serialized	Maintenance Required	Re-Order Threshold Required	Issue To WIC Participant	Notes
10	Books	Active	No	User	No	No	No	Yes	
11	Physical Activity Kit	Active	No	User	No	No	No	Yes	
12	Farmers Market Checks	Active	No	User	Yes	No	Yes	Yes	
13	Complimentary Formula	Active	Yes	System	No	No	No	Yes	
14	Activity Organizers	Active	No	User	Yes	No	Yes	Yes	
16	WIC Recipe Organizers	Active	No	User	No	No	No	Yes	

The newly added inventory type is marked as Active and is assigned a unique Type ID.

Task B. Editing an Inventory Type

Complete the following steps to perform this task:

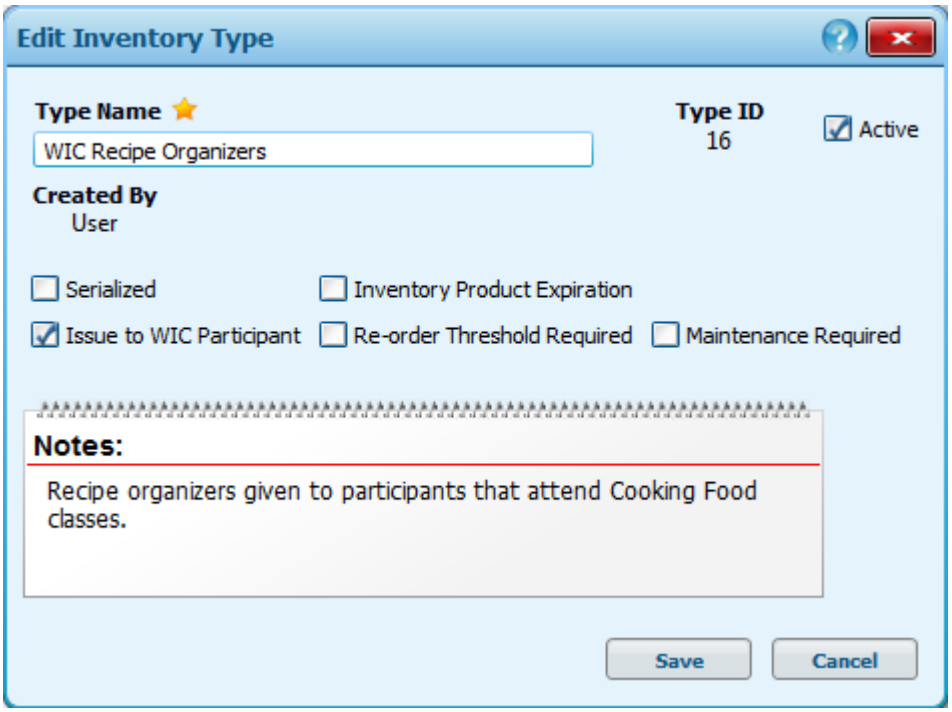
1. From the **Home** screen, go to **Operations → Inventory → Maintain Types**. The **Maintain Inventory Type** screen displays.



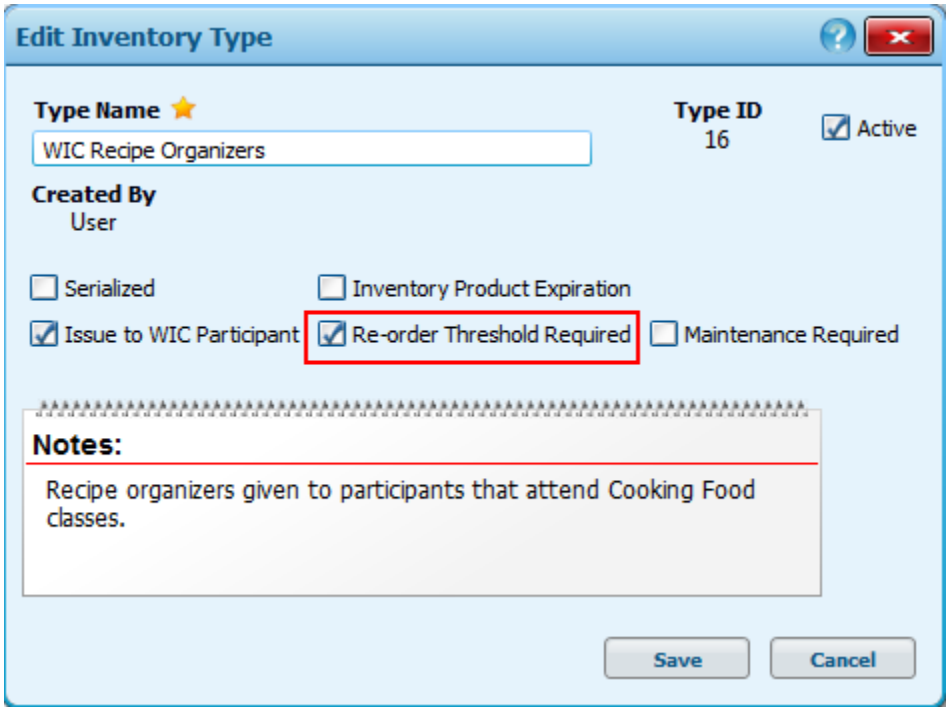
Type ID	Type Name	Status	Inventory Product Expiration	Defined By	Serialized	Maintenance Required	Re-Order Threshold Required	Issue To WIC Participant	Notes
2	Single-use Electric Breast Pumps	Active	No	System	No	No	Yes	Yes	
3	Multi-use Breast Pumps	Active	No	System	Yes	Yes	No	Yes	
4	Breast Feeding Supplies	Active	No	System	No	No	Yes	Yes	
5	EBT Cards	Active	No	System	Yes	No	Yes	Yes	
6	Manual Food Instruments	Active	No	System	Yes	No	No	Yes	
7	ID Cards	Active	No	System	Yes	No	Yes	Yes	
8	Formula in lieu of issuance	Active	Yes	System	No	No	No	Yes	
9	Check Stocks	Active	No	System	No	No	Yes	Yes	
10	Books	Active	No	User	No	No	No	Yes	
11	Physical Activity Kit	Active	No	User	No	No	No	Yes	
12	Farmers Market Checks	Active	No	User	Yes	No	Yes	Yes	
13	Complimentary Formula	Active	Yes	System	No	No	No	Yes	
14	Activity Organizers	Active	No	User	Yes	No	Yes	Yes	
16	WIC Recipe Organizers	Active	No	User	No	No	No	Yes	

The Inventory Type grid displays a list of all active inventory types. Click Show All to display both Active and Inactive inventory types within the grid.

2. Click the **Edit** button ( ). The **Edit Inventory Type** screen displays.



3. Edit the selected inventory type, as necessary.



4. Click **Save**. A status message displays indicating success. You are returned to the **Maintain Inventory Type** screen and the grid is updated to display the changes.

Congratulations!

You have successfully completed the **Maintain Types** process.

Maintain Manufacturers

This scenario explains the process of adding and editing manufacturers.

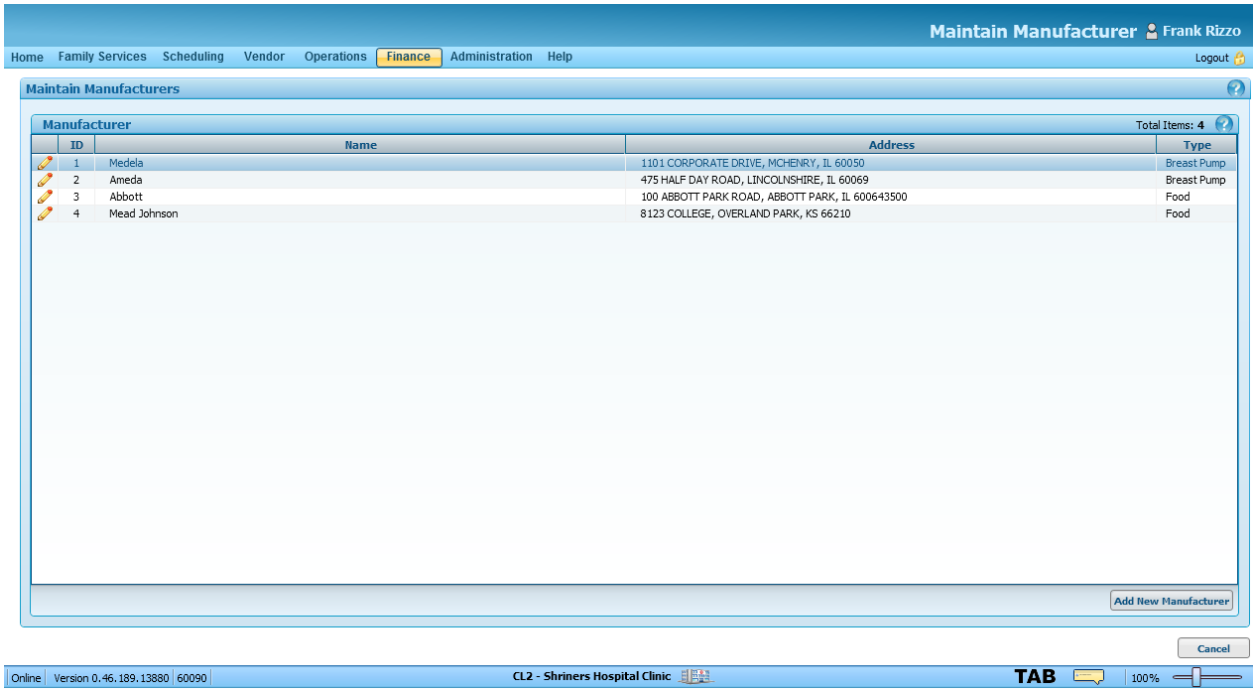
This process includes the following tasks:

Task A. Adding a New Manufacturer 9-57
Task B. Editing a Manufacturer 9-59

Task A. Adding a New Manufacturer

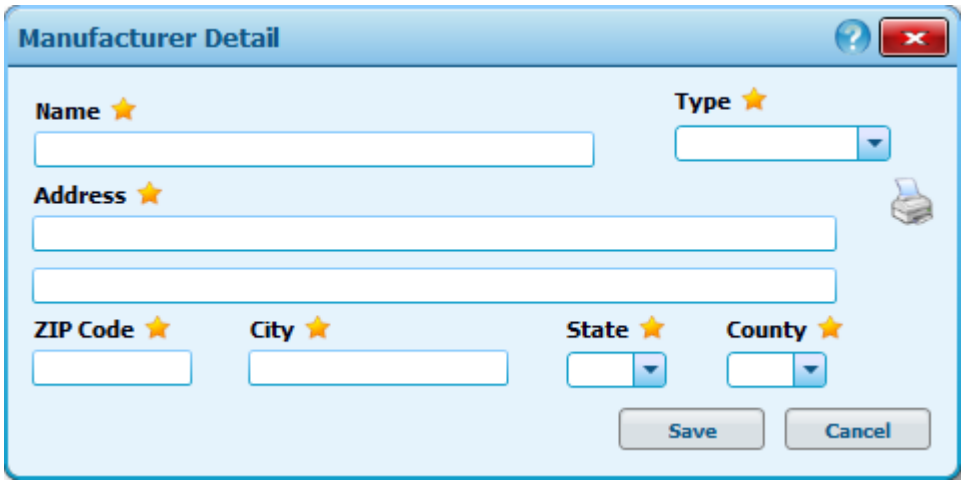
Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → Inventory → Maintain Manufacturers**. The **Maintain Manufacturer** screen displays.

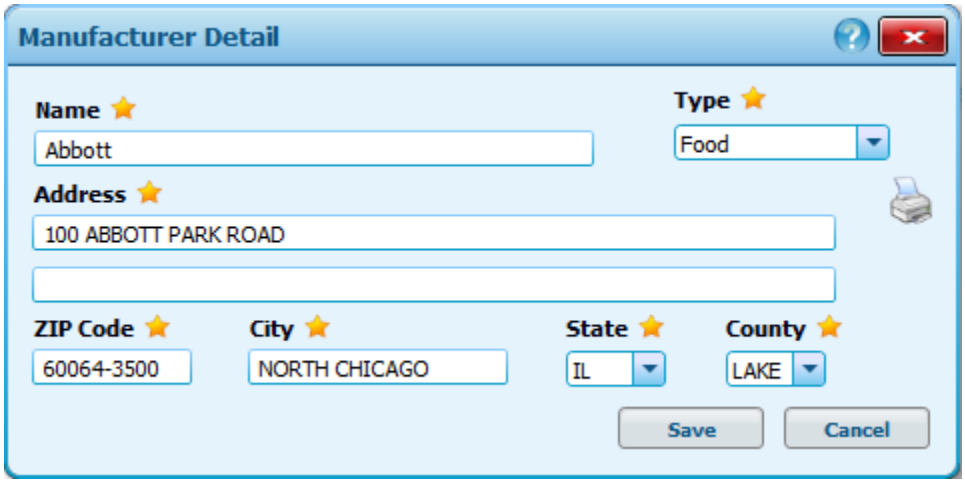


The Maintain Manufacturer grid displays a list of all active manufacturers.

2. Click **Add New Manufacturer**. The **Manufacturer Detail** screen displays.



3. Enter a manufacturer **Name**.
4. Enter **Type** (choose one)
    - Breast Pump
    - Food
5. Enter **Address**.
6. Enter **ZIP Code** (**City**, **State**, and **County** will automatically populate).

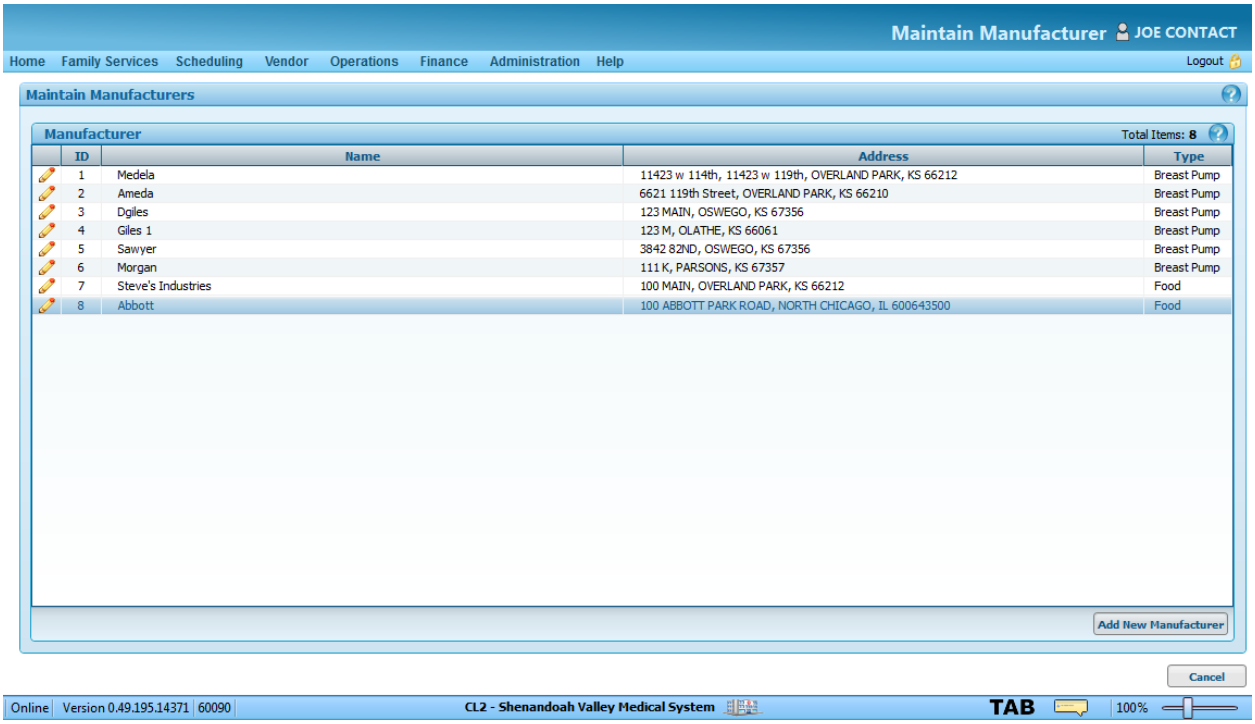


7. Click **Save**. A status message displays indicating success. You are returned to the **Maintain Manufacturer** screen and the newly added manufacturer is added to the grid.

Task B. Editing a Manufacturer

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → Inventory → Maintain Manufacturer**. The **Maintain Manufacturer** screen displays.

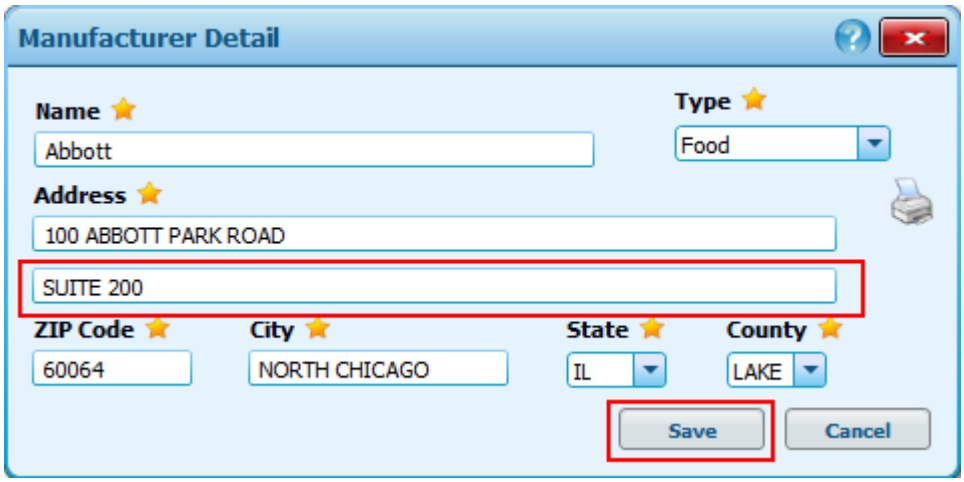


The Maintain Manufacturer grid displays a list of all active manufacturers.

2. Click the **Edit** button ( ) for the manufacturer you would like to edit. The **Manufacturer Detail** screen displays.

Manufacturer
Total Items: 8
ID
Name
Address
Type
1 Medela 11423 w 114th, 11423 w 119th, OVERLAND PARK, KS 66212 Breast Pump
2 Ameda 6621 119th Street, OVERLAND PARK, KS 66210 Breast Pump
3 Dgiles 123 MAIN, OSWEGO, KS 67356 Breast Pump
4 Giles 1 123 M, OLATHE, KS 66061 Breast Pump
5 Sawyer 3842 82ND, OSWEGO, KS 67356 Breast Pump
6 Morgan 111 K, PARSONS, KS 67357 Breast Pump
7 Steve's Industries 100 MAIN, OVERLAND PARK, KS 66212 Food
8 Abbott 100 ABBOTT PARK ROAD, NORTH CHICAGO, IL 600643500 Food

3. Edit the selected manufacturer, as necessary.



4. Click **Save**. A status message displays indicating success. You are returned to the **Maintain Manufacturer** screen and the grid is updated to display the changes.

Congratulations!

You have successfully completed the **Maintain Manufacturers** process.

Issued Formula Items

This scenario explains how to search for formula food items that have already been issued to participants.

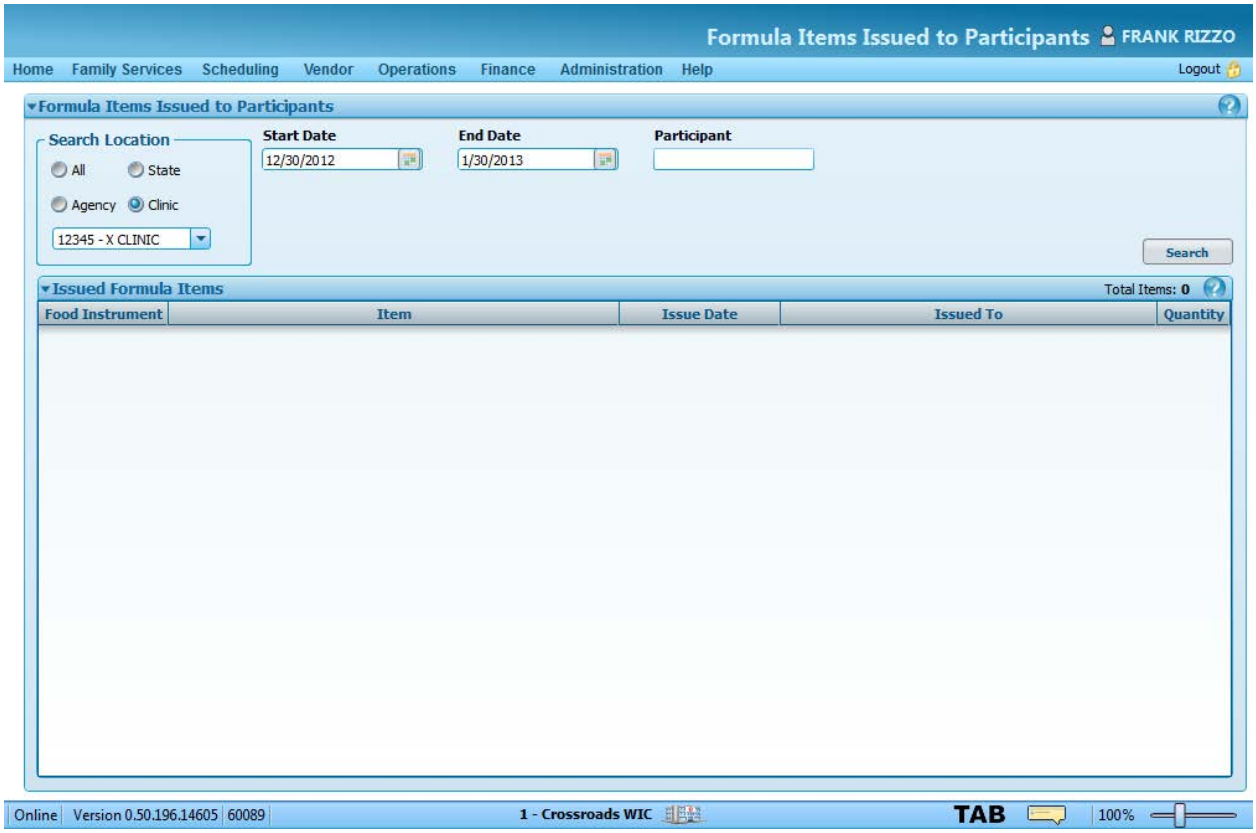
This process includes the following tasks:

Task A. Search for Formula Items Issued to Participants 9-62

Task A. Search for Formula Items Issued to Participants

Complete the following steps to perform this task:

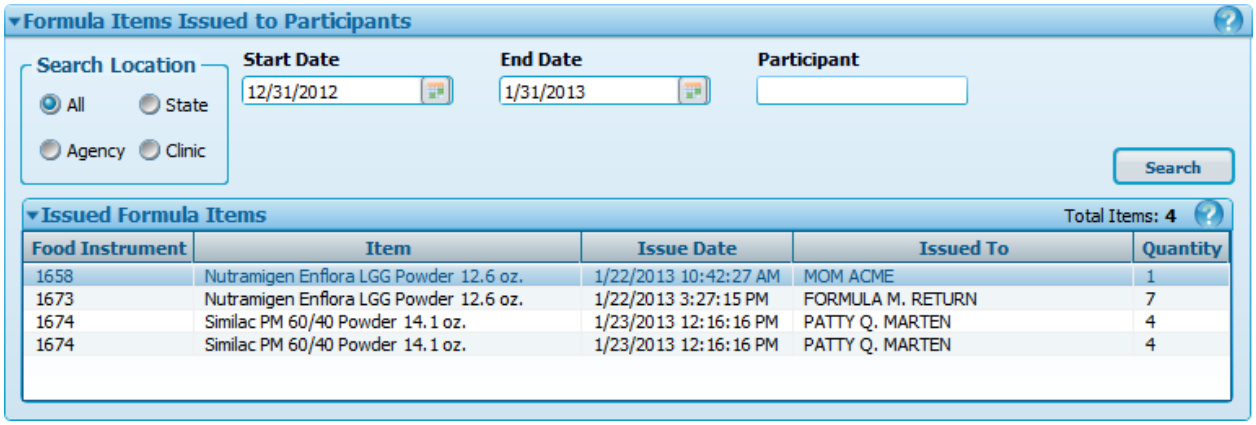
1. From the **Home** screen, go to **Operations → Inventory → Issued Formula Items**. The **Issued Formula Items** screen displays.



2. Under **Search Location**, select one of the following:
   - **All**
   - **State**
   - **Agency**
   - **Clinic**

Use the associated drop down list as necessary to further refine search criteria.

3. Complete information in one or more of the following to filter the list of results displayed in the **Issued Formula Items** grid:
   - **Start Date**
   - **End Date**
   - **Participant**
4. Click **Search** to perform a search. The **Issued Formula Items** grid refreshes and displays records matching the search criteria specified under **Formula Items Issued to Participants**.



The Issued Formula Items grid displays the Food Instrument, Item, Issue Date, Issued To for each formula food item issued that matches the search criteria currently specified under Formula Items Issued to Participants when Search is clicked.

Click a column header to sort the items in the grid. Click and hold, then drag and drop columns of information to reorganize the order of the columns in the grid.

5. View the list of formula food items displayed in the **Issued Formula Items** grid.

Congratulations!

You have successfully completed the **Issued Formula Items** process.

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10- MONITORING AND ANALYSIS

Local Agency Monitoring

This scenario explains the process of scheduling required agency monitoring visits and self-monitoring visits. **Local Agency Monitoring** also allows the state to record the clinics monitored and to record the results of the functional analysis review during the site visit. This screen provides an indicator for both agencies and clinics showing the percent of **On-Site Monitoring**. **Local Agency On-Site Monitoring** in the left panel shows the percentage of **Agencies** scheduled for the year. The percentage shows in red until the state established percentage is reached, and then the percentage turns green in color. The same is true for the clinics that are monitored. The **Current Monitoring** heading shows the percentage of clinics monitored, shown in red until the state required percentage is reached, and then turns to green.

This process includes the following tasks:

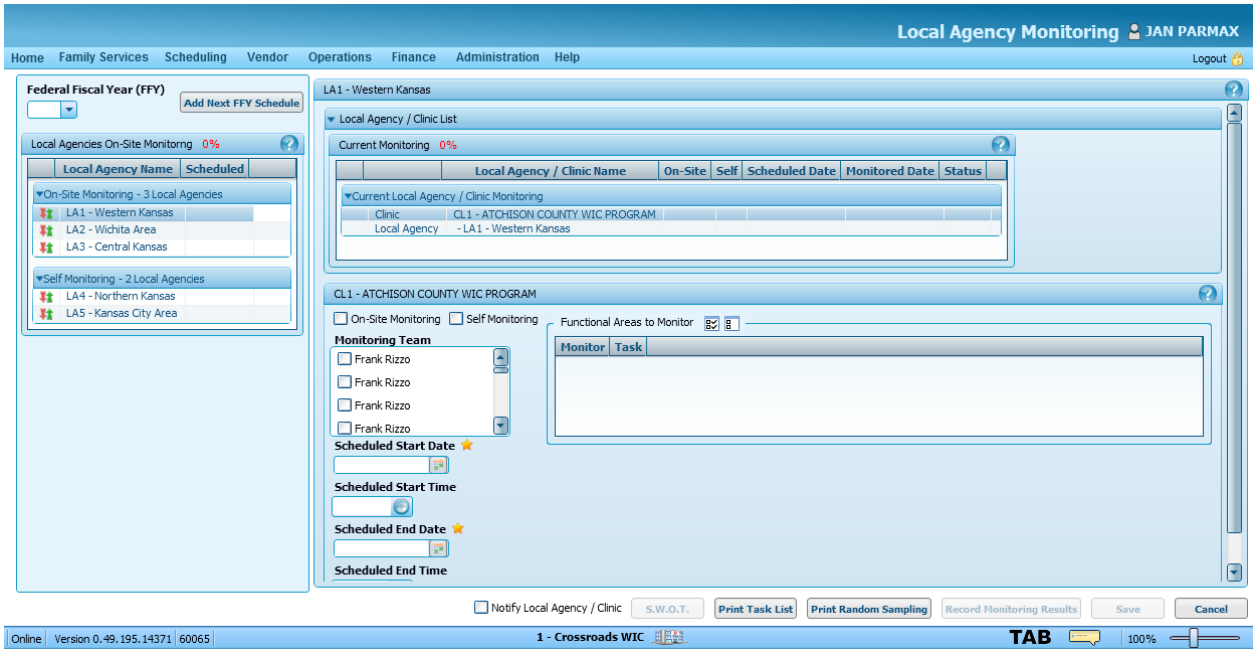
Task A. Scheduling Agencies and Clinics for On-Site Monitoring..... 10-2

Task B. Recording Agency and Clinic Monitoring Results..... 10-7

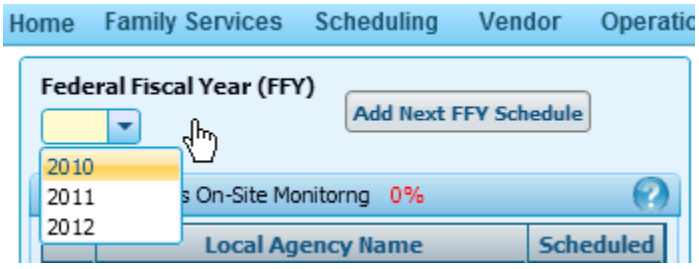
Task A. Scheduling Agencies and Clinics for On-Site Monitoring

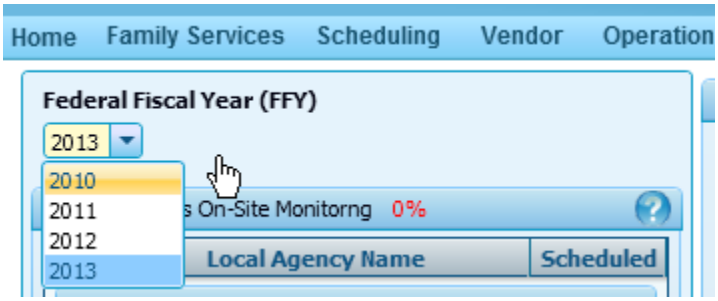
Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → Monitoring and Analysis → Local Agency Monitoring**. The **Local Agency Monitoring** screen displays.



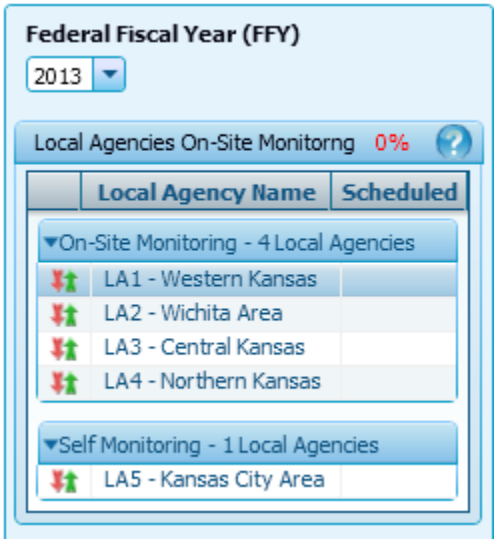
2. Enter or select the Federal Fiscal Year (FFY).
   - Click **Add Next FFY Schedule** to add the next FFY. The next FFY is added to the drop down list and the **Add Next FFY Schedule** button is hidden from view.





There is a system configuration setting that indicates the date for Local Agency Monitoring to set the next FFY schedule. In the normal course of events when this date is reached, the end of day processes will automatically create a new FFY and update the background scheduling processes. Assuming this process occurs, the Add Next FFY button will not display on the screen.

3. Under **Local Agencies On-Site Monitoring**, click the **Move** icon to move agencies to or from the On-site Monitoring and Self Monitoring grids.

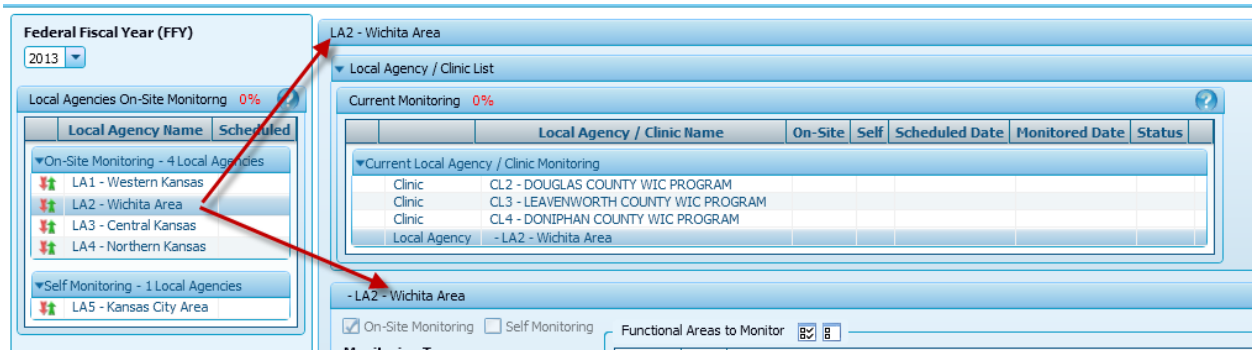


The On-site Monitoring grid represents the agencies required to be monitored by the State for the selected fiscal year. The Self Monitoring grid represents the agencies that do not require on-site monitoring for the selected fiscal year, but can perform self monitoring.

4. View the percentage (%) next to **Local Agencies On-Site Monitoring**.

The percentage represents the number of agencies that have been scheduled for on-site monitoring for the selected FFY. This percentage is configurable. Federal regulations require all agencies to be monitored every two years, which averages 50 %, but states can set the percentage where they want for any year. If the percentage is shown in red, the state has not met the threshold set for that year. If the percentage is shown in green, the threshold has been met.

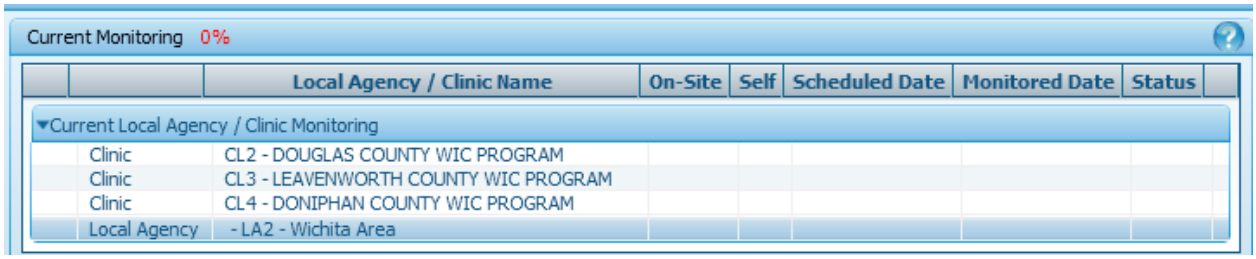
5. Under **Local Agencies On-Site Monitoring**, select an agency to schedule on-site monitoring. The agency and list of associated clinics are displayed within the **Current Monitoring** grid.



Notice that the Local Agencies On-Site Monitoring shows 0%, in red, representing the agencies that have been scheduled, none in this case. When they are scheduled a green check mark is added and the percent scheduled will change. When sufficient agencies have been scheduled to meet the percentage required each year, the percent will become green.

The red and green arrows on the left allow the agencies to be moved to either On-Site or Self Monitoring for the Federal Fiscal Year, to allow states to schedule the required number of On-Site monitoring visits.

6. Under **Current Monitoring**, select the agency or a clinic to schedule for monitoring by clicking on the desired row in the grid. The screen is updated to display the related information for the selection.


Current Monitoring 0%
Local Agency / Clinic Name
On-Site
Self
Scheduled Date
Monitored Date
Status
Current Local Agency / Clinic Monitoring
Clinic CL2 - DOUGLAS COUNTY WIC PROGRAM
Clinic CL3 - LEAVENWORTH COUNTY WIC PROGRAM
Clinic CL4 - DONIPHAN COUNTY WIC PROGRAM
Local Agency - LA2 - Wichita Area

7. View the **On-site Monitoring** and **Self Monitoring** check boxes.

The On-site Monitoring check box is selected and disabled automatically if:

- The selected agency is listed within the On-site Monitoring grid.
- The agency is selected in the Current Monitoring grid.

The Self Monitoring check box is selected and disabled automatically if:

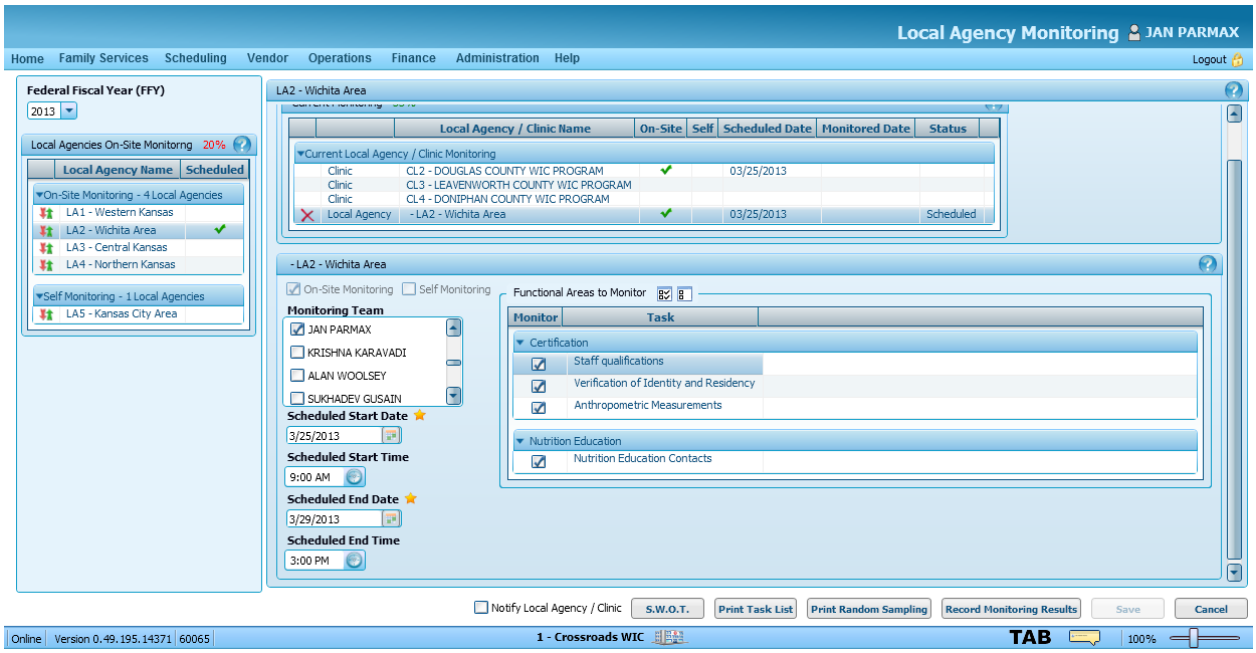
- The selected agency is listed within the Self Monitoring grid.
- The agency is selected in the Current Monitoring grid.

If a clinic is selected for monitoring, On-site Monitoring or Self Monitoring must be manually selected.

8. Within the **Monitoring Team** multi-select list box, select one or more staff scheduled to monitor the agency.
9. Enter or select the following items to schedule an agency for monitoring:
   - **Scheduled Start Date**
   - **Scheduled Start Time**
   - **Scheduled End Date**
   - **Scheduled End Time**
10. Select or unselect **Functional Areas to Monitor**, as needed.

This grid displays functional areas defined during the setup process.

11. Click **Save**. A status message displays indicating success and the screen refreshes.



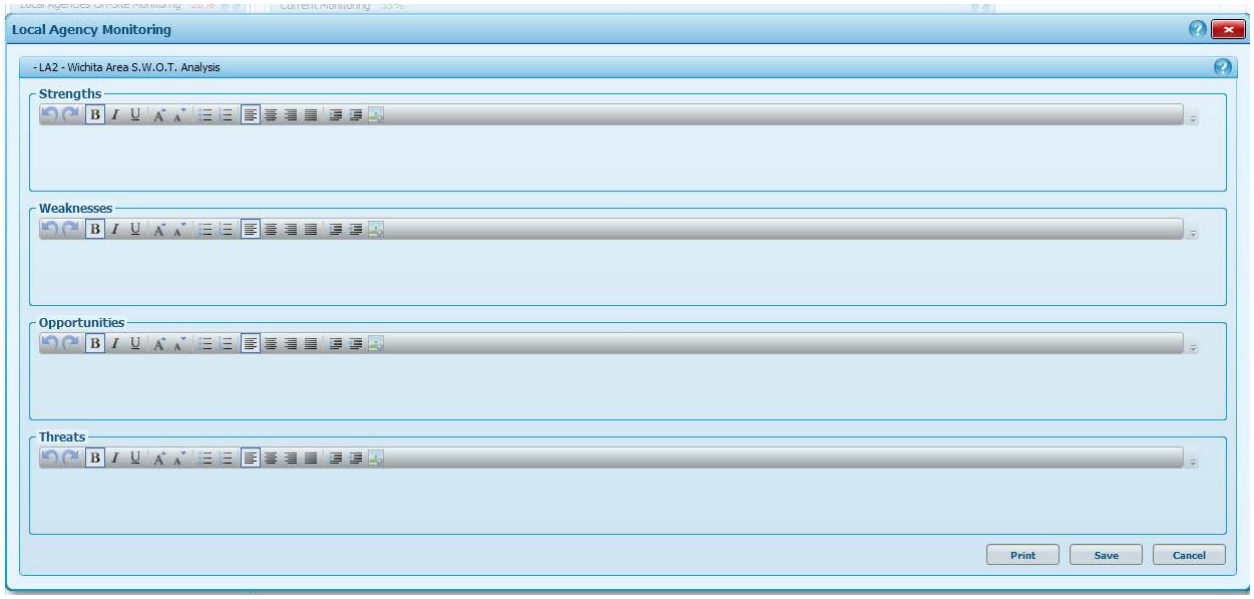
The Local Agency On-site Monitoring percentage is updated to display the percentage of agencies scheduled.

The SWOT and Record Monitoring Results buttons are:

- ❖ Enable if an agency is scheduled.
- ❖ Disabled if a clinic is scheduled.

12. After scheduling the agency, you may select or click the following:

- **Notify Local Agency / Clinic** check box: Select to send a communication to the agency detailing the date of the on-site monitoring visit.
- **SWOT** button: Click to document strengths, weaknesses, opportunities and threats.

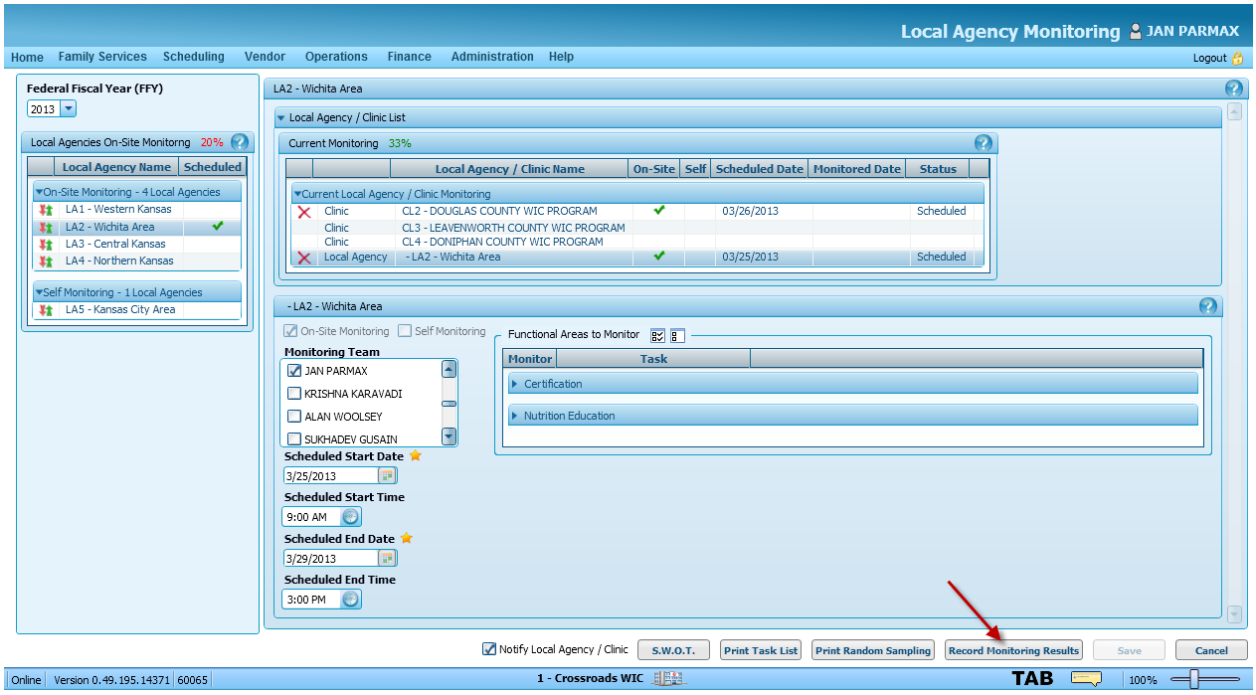


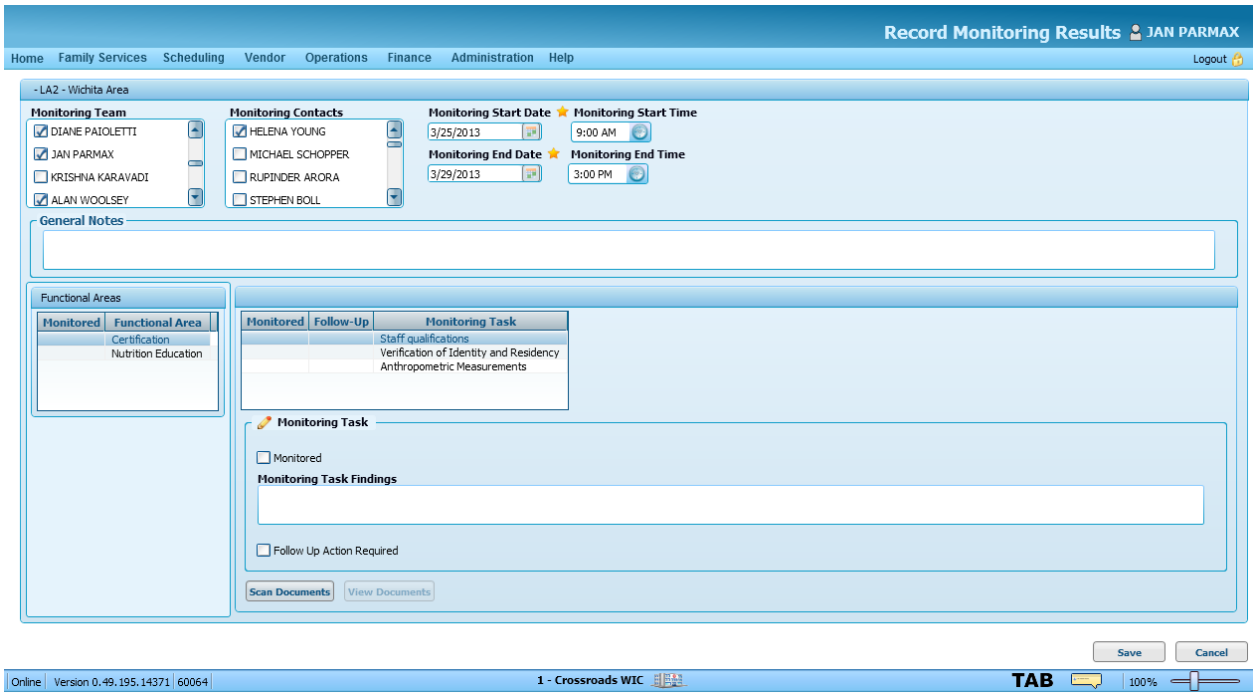
- **Print Task List** button: Click to print a copy of the functional areas and tasks selected to use during the monitoring visit.
- **Print Random Sampling** button: Click to select a random sample of participants for the monitoring visit.

Task B. Recording Agency and Clinic Monitoring Results

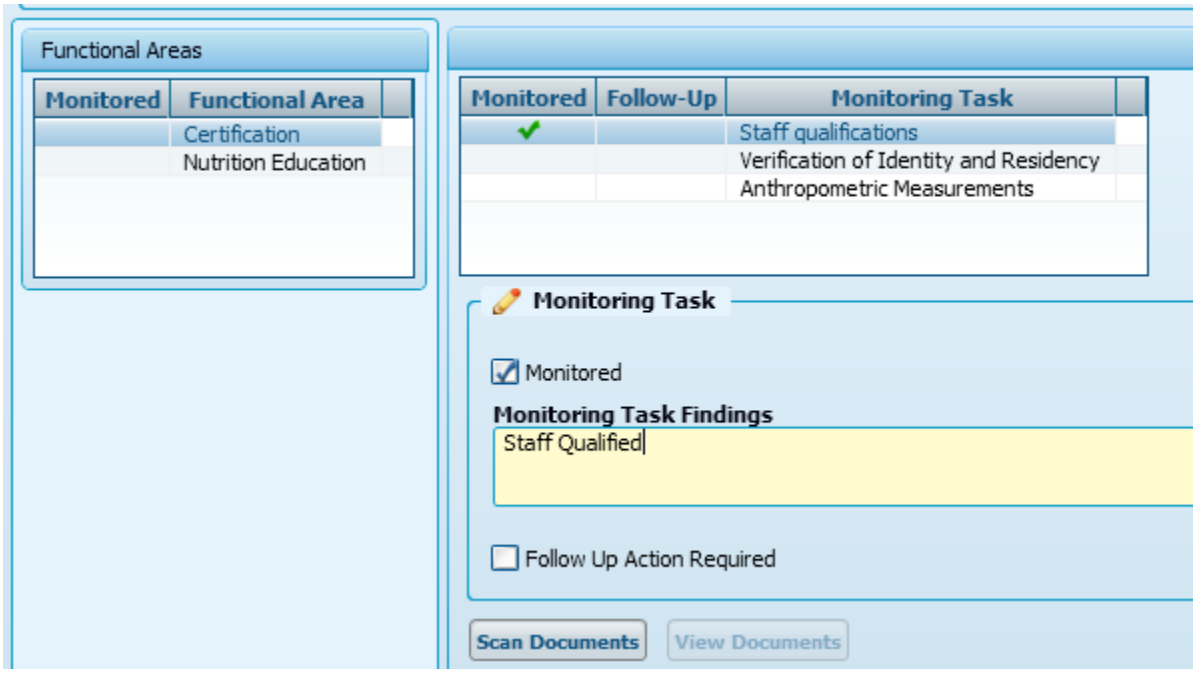
Complete the following steps to perform this task:

1. When an agency or clinic has been scheduled for monitoring and you are ready to record the results, click **Record Monitoring Results**. The **Local Agency Monitoring Results** pop up displays for the agency or clinic selected.

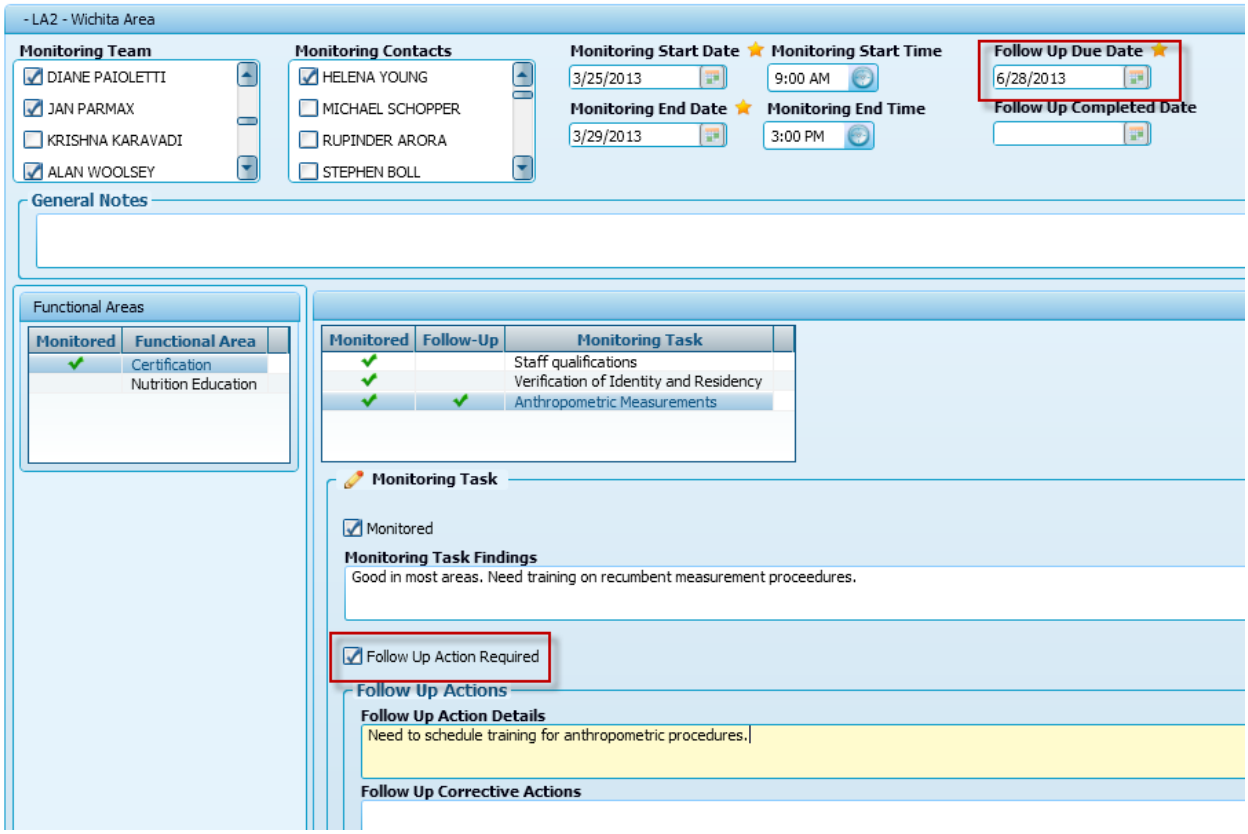




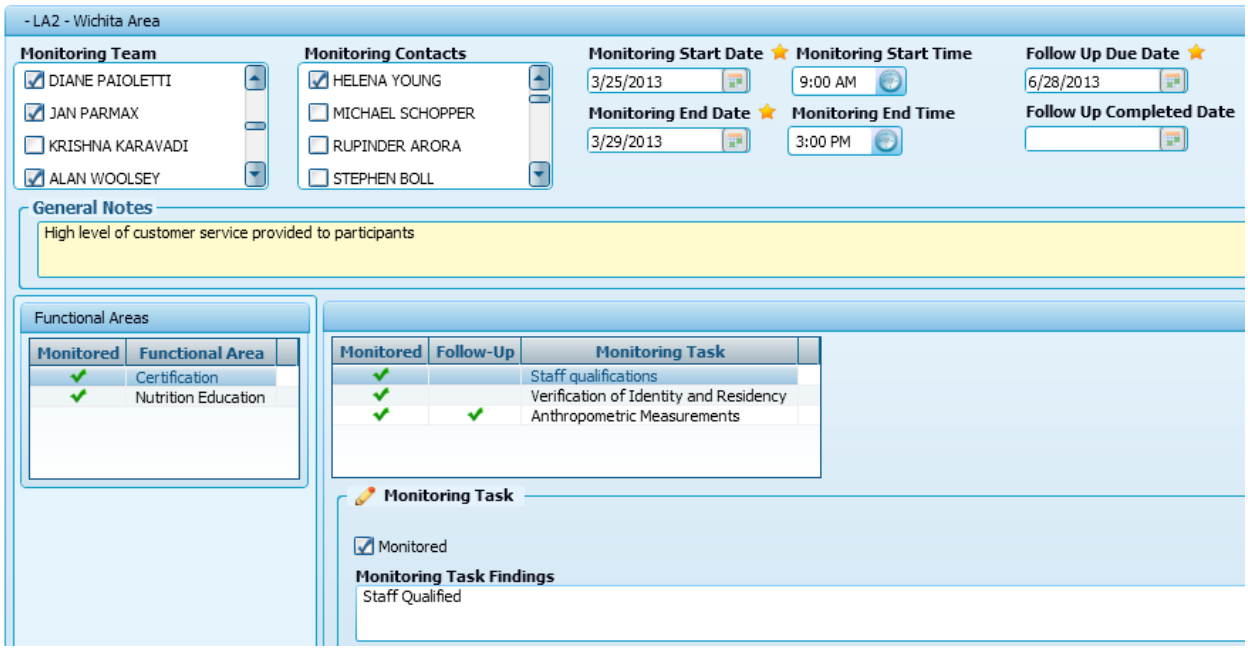
2. Within the **Monitoring Team** multi-select list box, select one or more staff members who performed the monitoring.
3. Within the **Monitoring Contacts** multi-select list box, select one or more contacts who participated in the monitoring.
4. Enter or select the following items to record the actual data for monitoring visit:
    - **Monitoring Start Date** and **Time** - Record the actual starting date and time.
    - **Monitoring End Date** and **Time** - Record the actual ending date and time.
    - Enter any note about the monitoring visit.
5. For each functional area indicate if the monitoring task was completed by checking **Monitored**.
6. Enter the **Monitoring Task Findings** in the text box.



7. Check **Follow Up Action Required** if applicable. The screen refreshes, displaying the **Follow up Actions** box and **Follow Up Due Date**.



8. Complete the **Follow Up Action Details**.
9. Complete the **Follow up Corrective Actions**.
10. Enter or select the **Follow Up Due Date**.
11. When the monitoring task recording is complete, select the next monitoring task. A new monitoring task displays and a green check is placed under **Monitored** and **Follow-Up**, if applicable.



12. When all tasks have been documented as monitored or not, click **Save**.

The process of recording monitoring results is the same, once an agency or clinic is selected in the Current Monitoring panel, and must be documented for the agency and all clinics that are scheduled.

Congratulations!

You have successfully completed the **Local Agency Monitoring** process.

Local Agency and Clinic Self-Monitoring

This scenario explains how agencies and clinics can perform self monitoring and how the results are recorded.

Before an agency can be self monitored, the agency must be configured for self monitoring, which is arranged at the state level. This is discussed in the Local Agency Monitoring training scenarios.

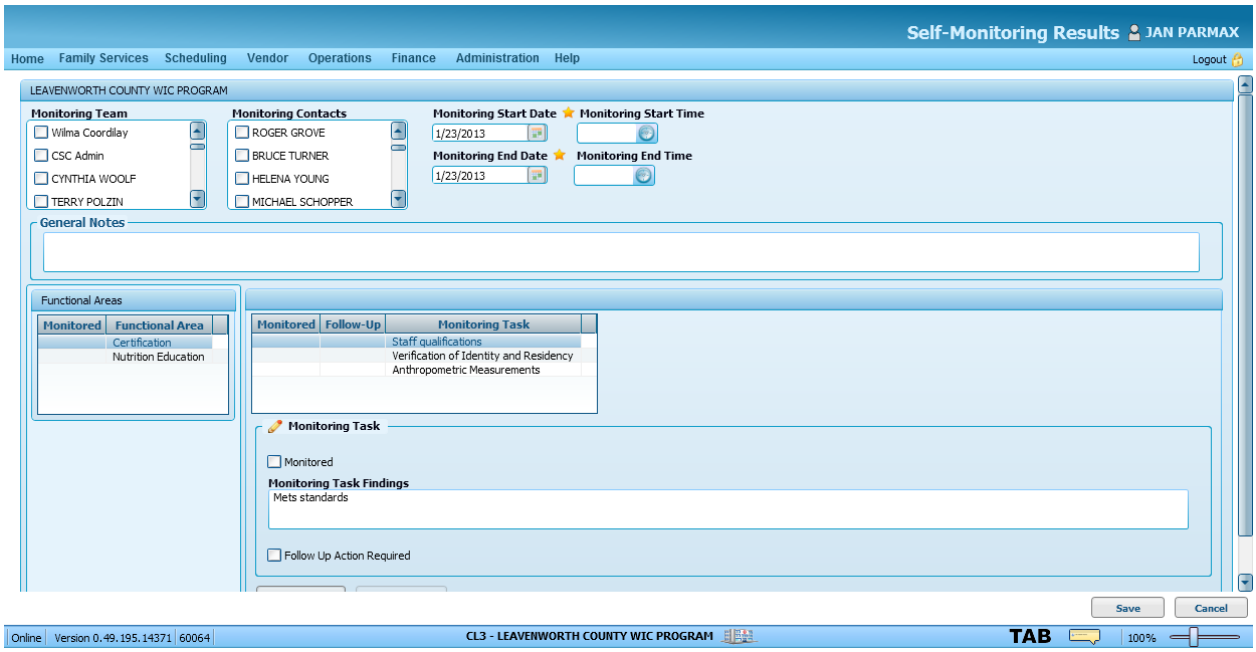
This process includes the following task:

Task A. Recording Agency or Clinic Self-Monitoring Results..... 10-12

Task A. Recording Agency or Clinic Self-Monitoring Results

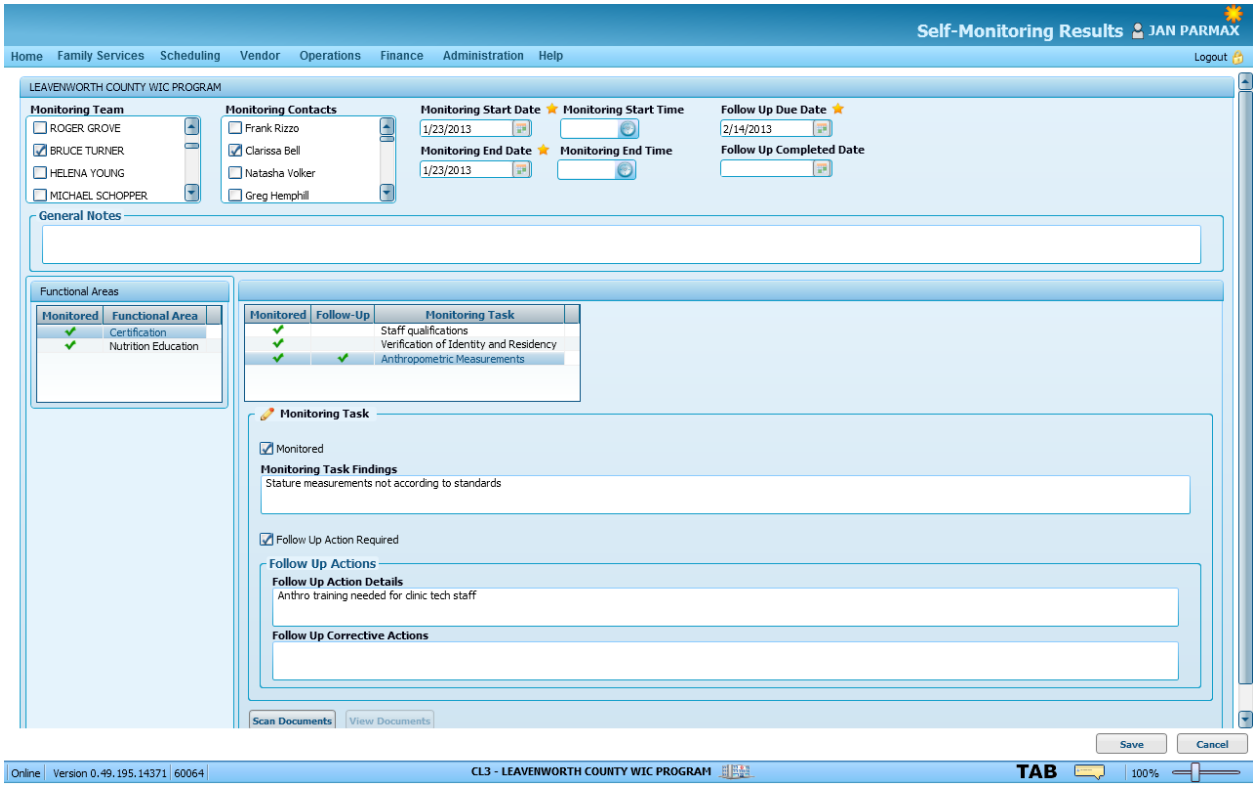
Complete the following steps to perform this task:

1. Log in using the **Local Agency** and **Clinic** values for a clinic that has previously been configured for self monitoring.
2. From the **Home** screen, go to **Operations → Monitoring and Analysis → Local Agency and Clinic Self-Monitoring**. The **Self-Monitoring Results** screen displays.



The Self-Monitoring Results screen displays only if the current location is scheduled for self monitoring.

3. Within the **Monitoring Team** multi-select list box, select one or more staff who performed the monitoring.
4. Within the **Monitoring Contacts** multi-select list box, select one or more contacts who participated in the monitoring.
5. Enter or select the following items to record the actual data for monitoring visit:
   - **Monitoring Start Date** and **Time** - Record the actual starting date and time.
   - **Monitoring End Date** and **Time** - Record the actual ending date and time.
   - Enter any note about the monitoring visit.
6. For each functional area indicate if the monitoring task was completed by checking **Monitored**.
7. Record the **Monitoring Task Findings** in the text box.
8. Check **Follow Up Action Required** if applicable. The **Follow up Action Details** box opens.
9. Complete the **Follow Up Action Details**.
10. Complete the **Follow up Corrective Actions**.
11. When the monitoring task recording is complete, select the next monitoring task. A new monitoring task displays and a green check is placed under **Monitored** and **Follow-Up**, if applicable.



If a Follow Up Action has been recorded, two new fields become enabled: Follow Up Due Date and Follow Up Completed Date. A value must be entered into the Follow Up Due Date field before saving.

12. When all tasks have been documented, click **Save**.

Congratulations!

You have successfully completed the **Local Agency and Clinic Self-Monitoring** process.

Local Agency and Clinic Analysis

This scenario explains the process of using the **Local Agency and Clinic Analysis** feature. This function allows the creation of a number of reports based on parameters selected by the user.

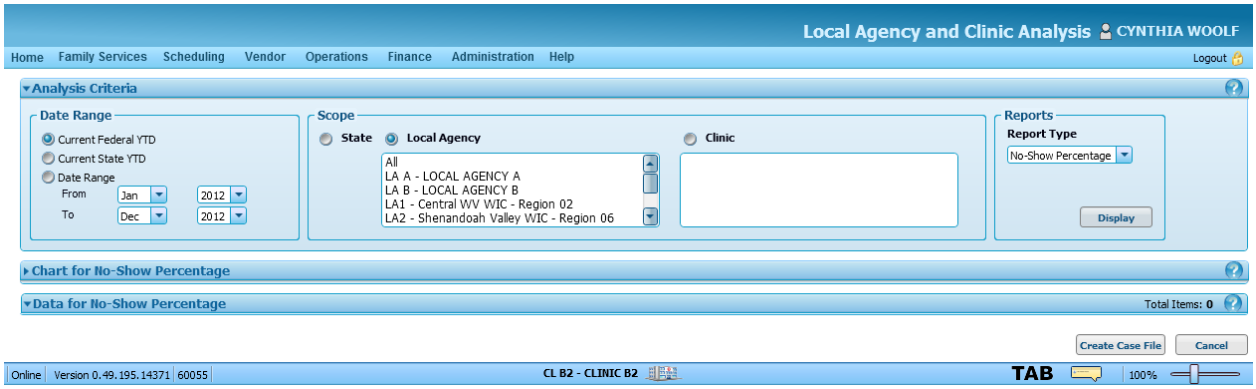
This process includes the following tasks:

Task A. Selecting the Parameters for the Report 10-16
Task B. Selecting and Displaying the Report for Agencies and Clinics 10-17

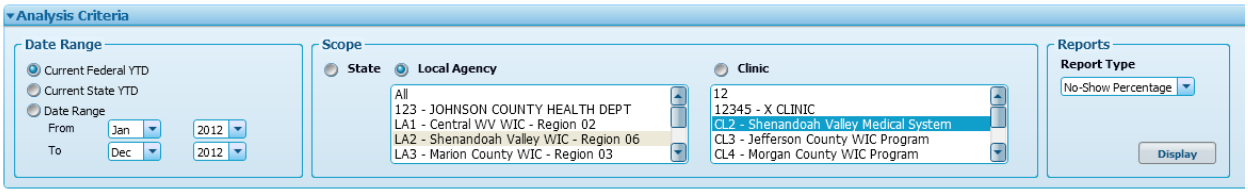
Task A. Selecting the Parameters for the Report

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → Monitoring and Analysis → Local Agency and Clinic Analysis**. The **Local Agency and Clinic Analysis** screen displays.



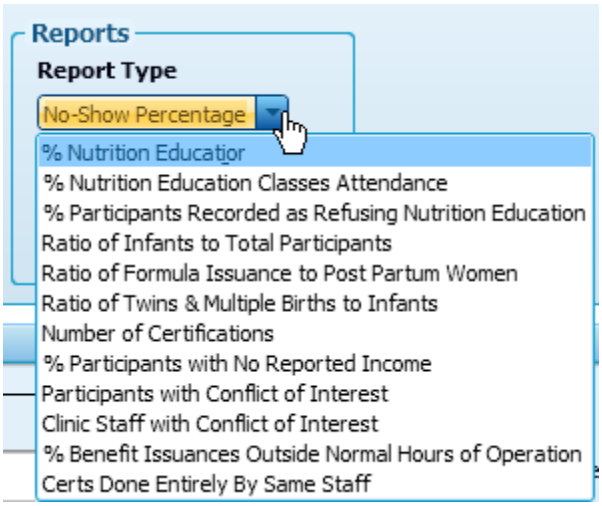
2. Select the **Date Range** for the report:
   - **Current Federal YTD** (Year to Date)
   - **Current State YTD** (Year to Date)
   - **Date Range** (**From**, **To**)
   - Select the **Scope**.
     - **State**
     - **Local Agency** (select from list)
     - **Clinic** (select from list)



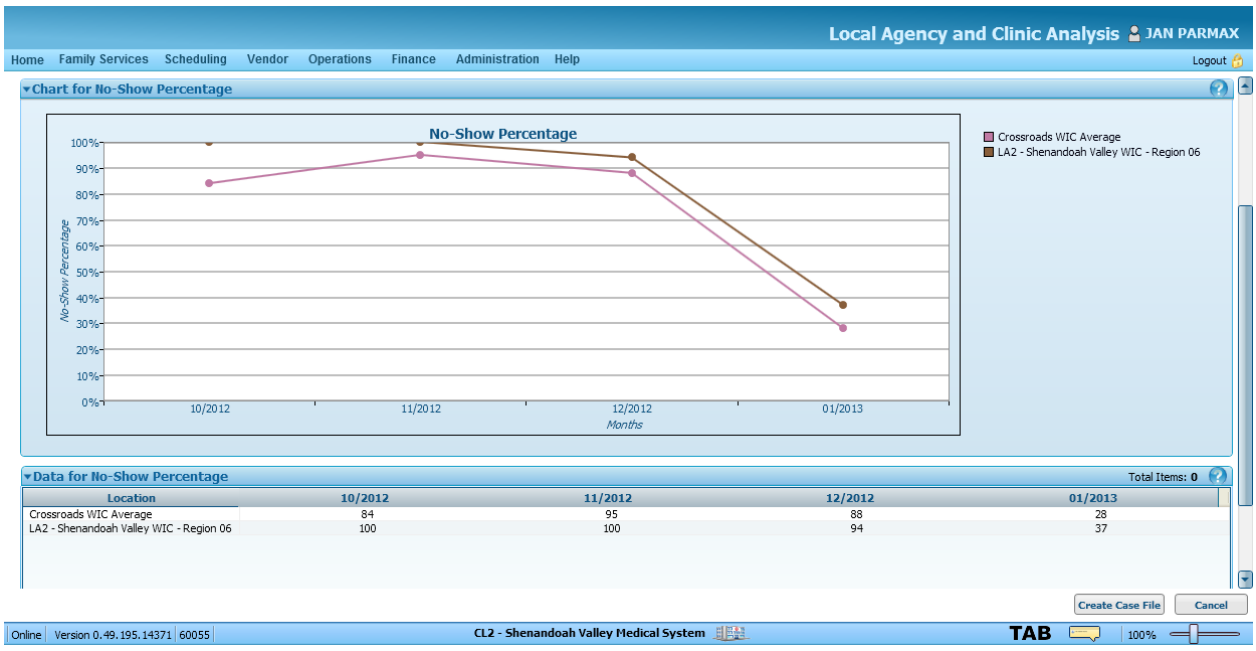
Task B. Selecting and Displaying the Report for Agencies and Clinics

Complete the following steps to perform this task:

1. Under **Reports**, select the **Report Type**.


Reports
Report Type
No-Show Percentage
% Nutrition Educatior
% Nutrition Education Classes Attendance
% Participants Recorded as Refusing Nutrition Education
Ratio of Infants to Total Participants
Ratio of Formula Issuance to Post Partum Women
Ratio of Twins & Multiple Births to Infants
Number of Certifications
% Participants with No Reported Income
Participants with Conflict of Interest
Clinic Staff with Conflict of Interest
% Benefit Issuances Outside Normal Hours of Operation
Certs Done Entirely By Same Staff

2. When a report is selected, click **Display**. The report displays as the first drop down chart.
3. To display data from the chart, click on second drop down bar with title of **Data for <chart name>**.



Congratulations!

You have successfully completed the **Local Agency and Clinic Analysis** process.

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11- MANAGE STAFF TRAINING

Manage Staff Training

This scenario explains the process of navigating to the master calendar and scheduling an event, defining the event, and managing staff training once an event has been defined.

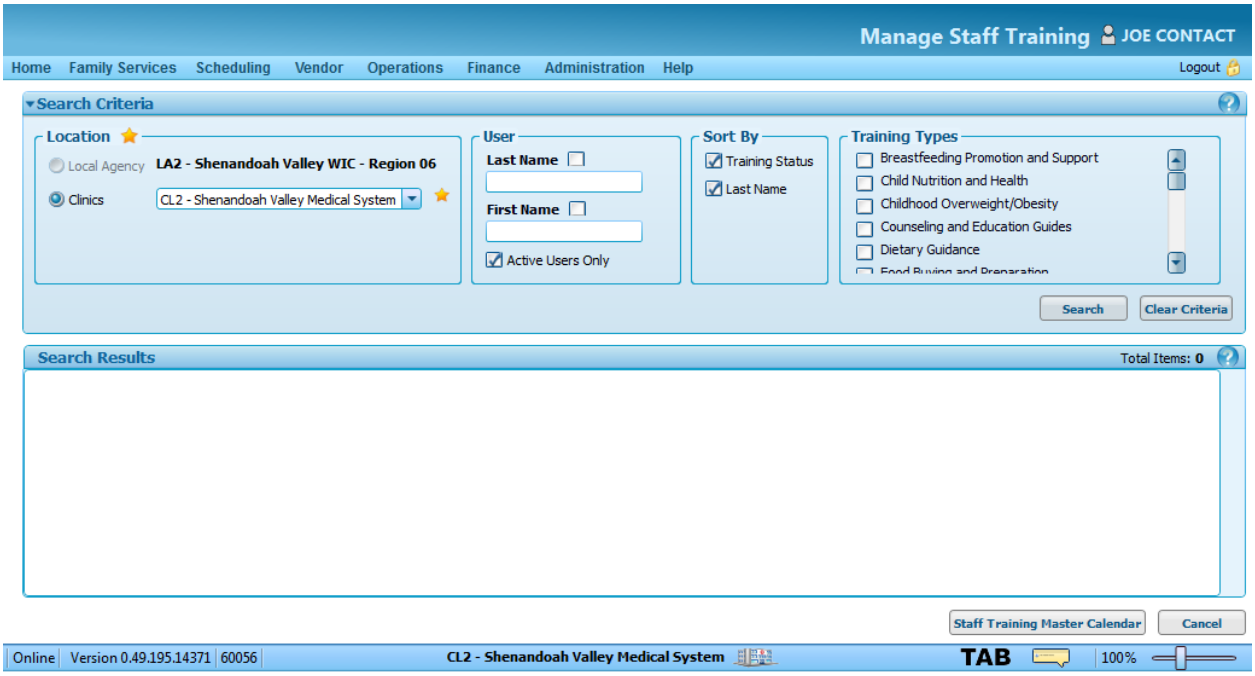
This process includes the following tasks:

Task A. Navigating to the Master Calendar and Scheduling an Event..... 11-2
Task B. Defining the Training Event..... 11-5
Task C. Managing Staff Training 11-6

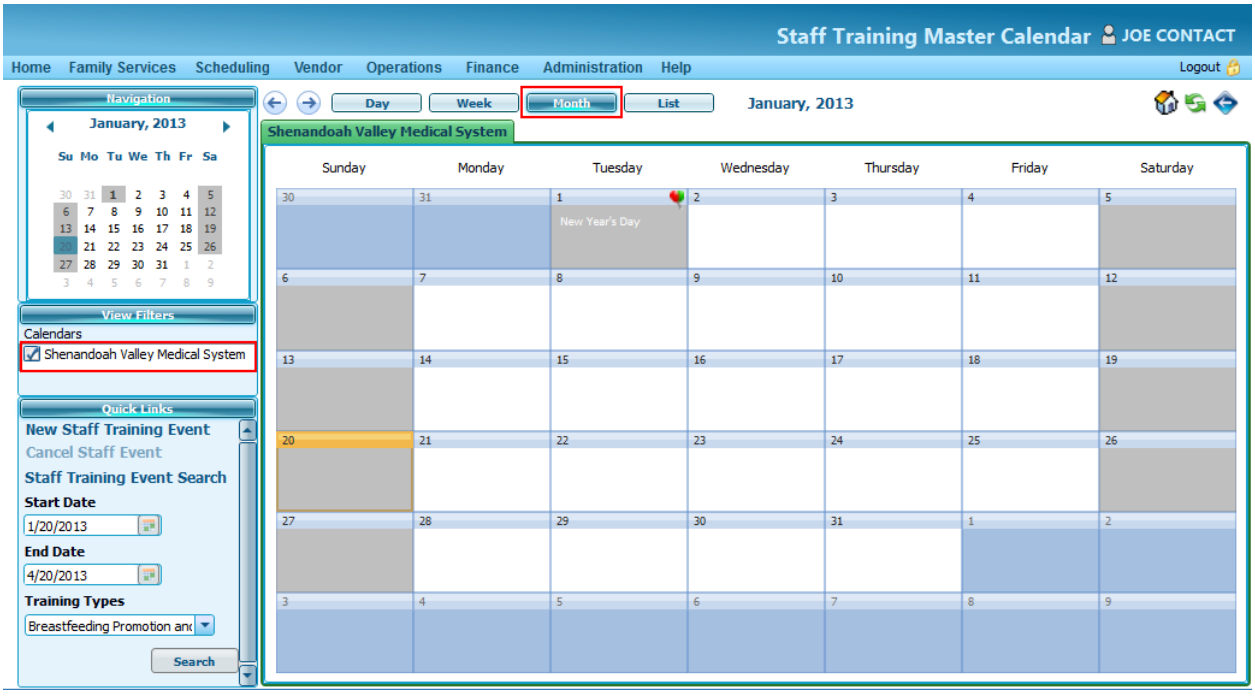
Task A. Navigating to the Master Calendar and Scheduling an Event

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → Manage Staff Training**. The **Manage Staff Training** screen displays.



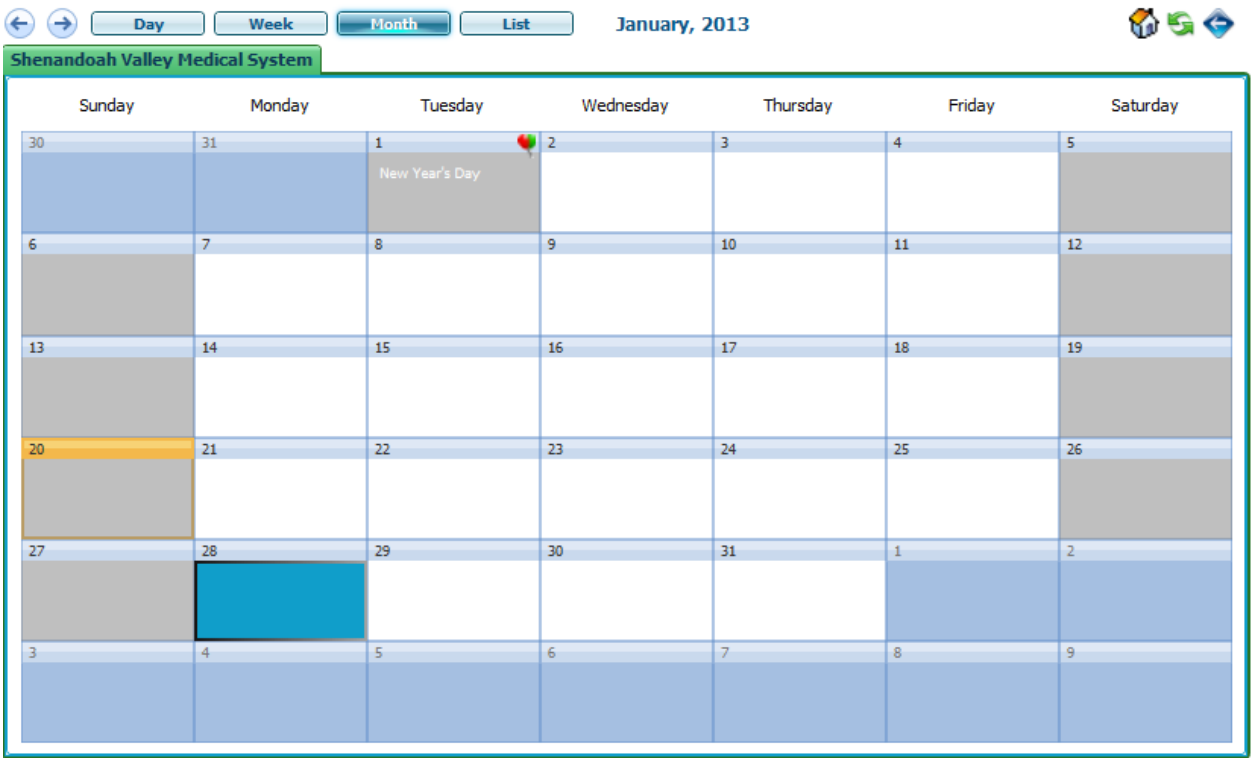
2. Click **Staff Training Master Calendar**. The **Staff Training Master Calendar** screen displays.



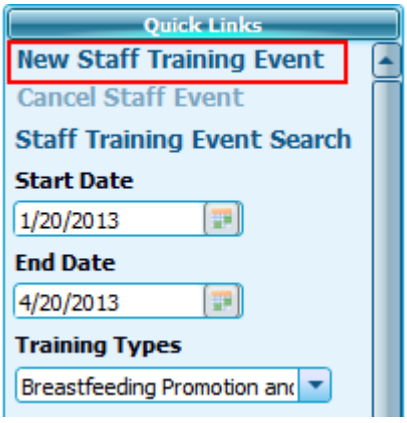
The screen above displays the master calendar for one clinic location only. Multiple calendars can be displayed at once by checking more than one clinic location option.

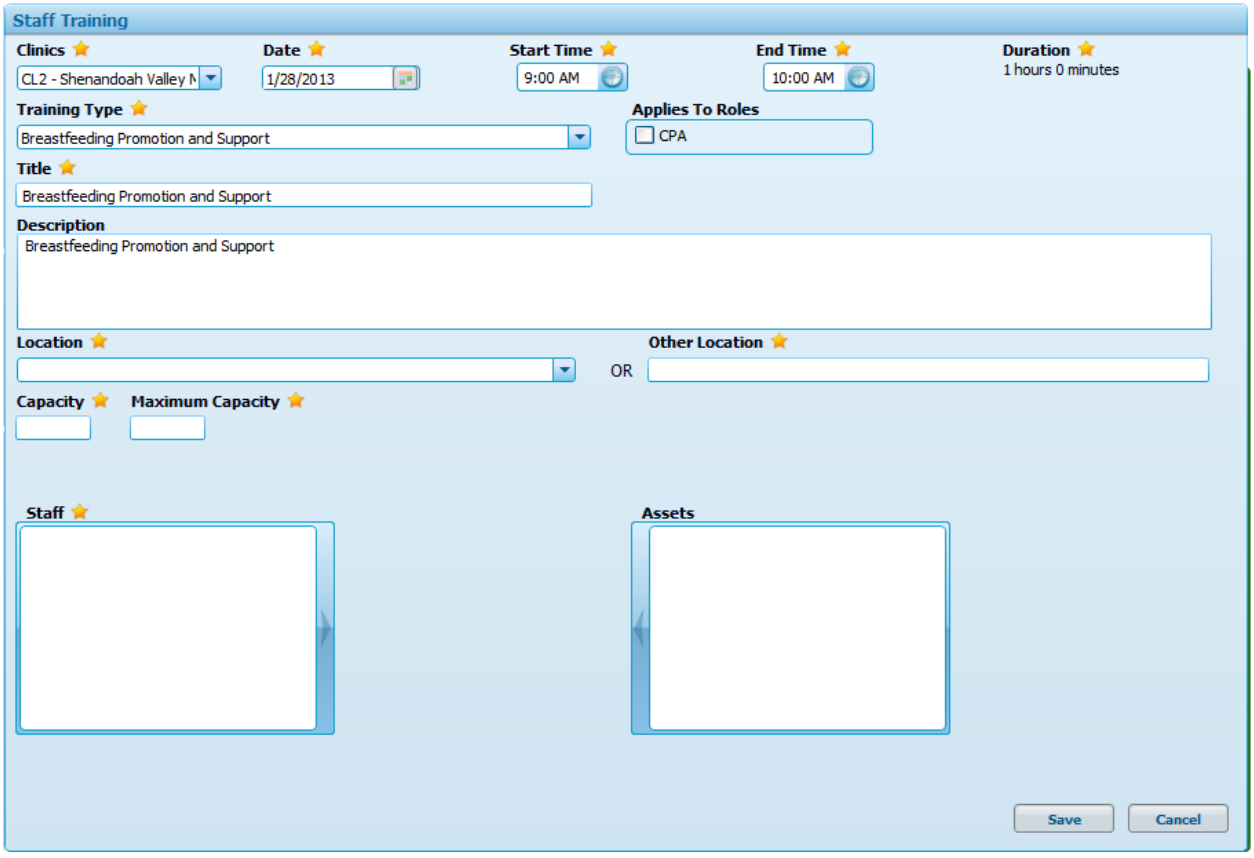
The Month view is selected in the screen above.

3. Select the desired day within the calendar grid to schedule a training event.



4. Click **New Staff Training Event**. The **Staff Training Master Calendar** screen refreshes to display options enabling an event to be defined.

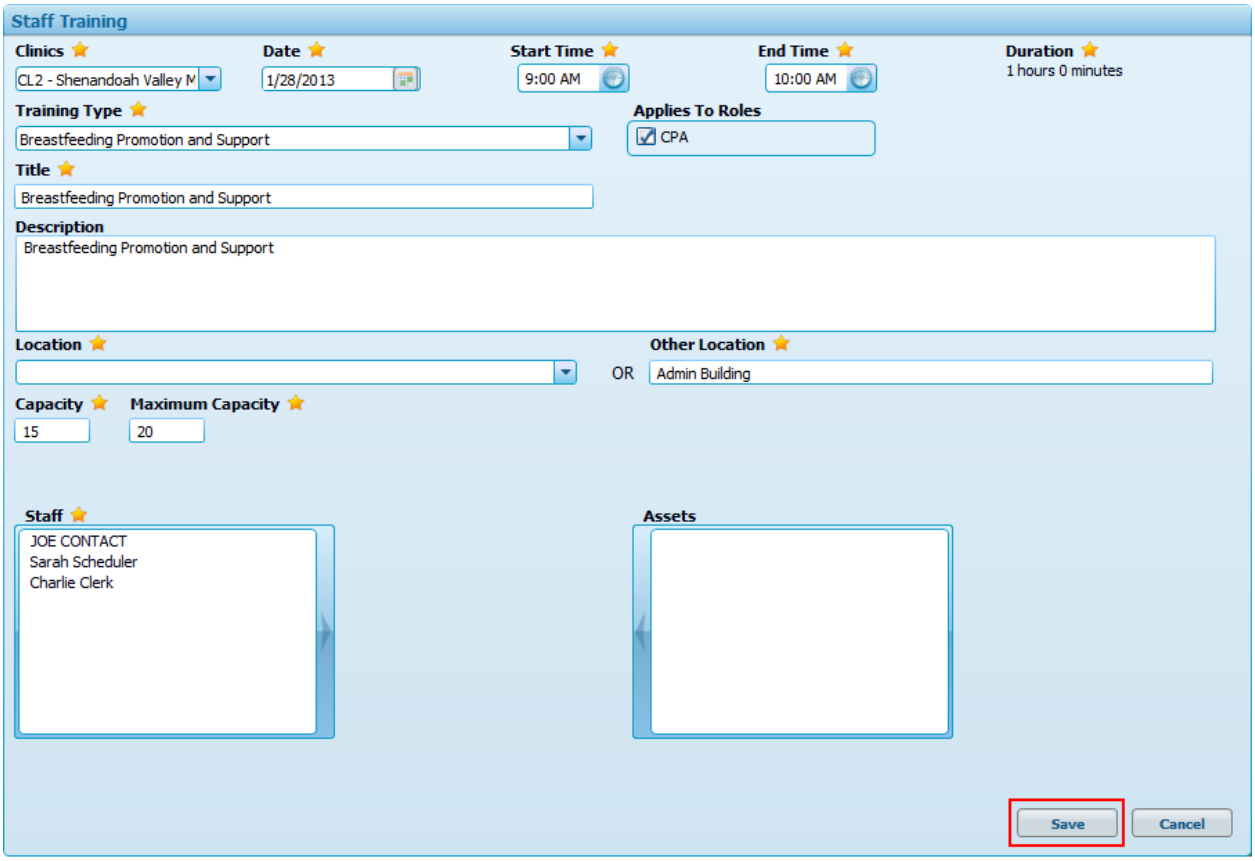



Staff Training
Clinics
CL2 - Shenandoah Valley M
Date
1/28/2013
Start Time
9:00 AM
End Time
10:00 AM
Duration
1 hours 0 minutes
Training Type
Breastfeeding Promotion and Support
Applies To Roles
CPA
Title
Breastfeeding Promotion and Support
Description
Breastfeeding Promotion and Support
Location
OR
Other Location
Capacity
Maximum Capacity
Staff
Assets
Save
Cancel

Task B. Defining the Training Event

Complete the following steps to perform this task:

1. Select the **Clinics** for the event.
2. Modify the **Date**, if necessary.
3. Enter a **Start Time**.
4. Enter an **End Time**.
5. Select a **Training Type**.
6. Within **Applies to Roles**, select the roles to which the training applies.
7. Enter a **Description**.
8. Select a **Location** or enter a custom location in **Other Location**.
9. Enter a **Capacity** for the event.
10. Enter the **Maximum Capacity** for the event.
11. Within the **Staff** slider list box, select the desired staff members from the list of staff members.
12. Within the **Assets** slider list box, select the desired assets from the list of assets.

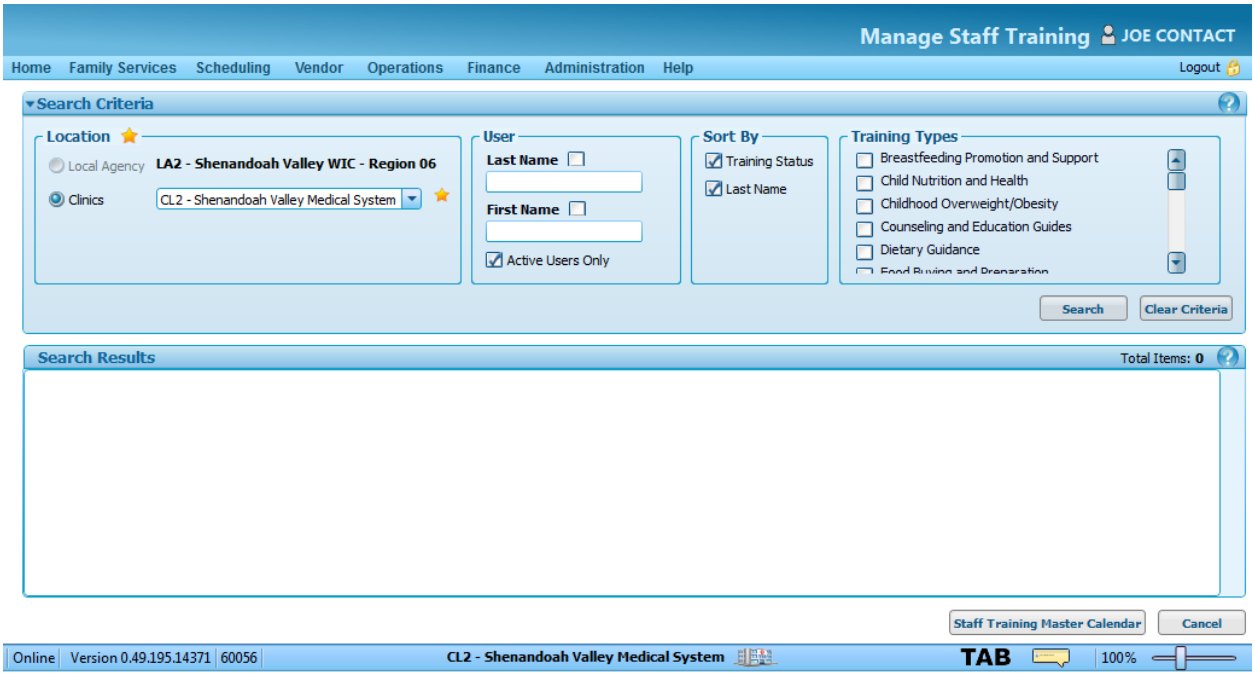


13. Click **Save**. A status message displays indicating success and you are returned to the **Staff Training Master Calendar** screen.

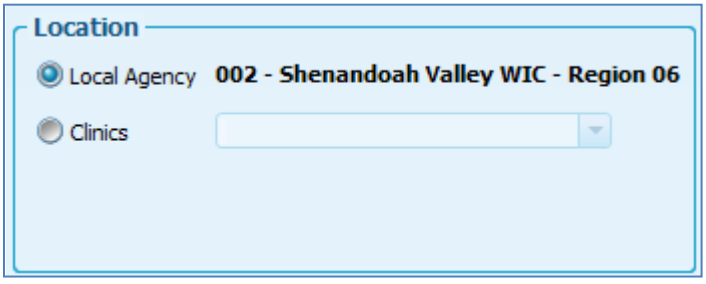
Task C. Managing Staff Training

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → Manage Staff Training**. The **Manage Staff Training** screen displays.



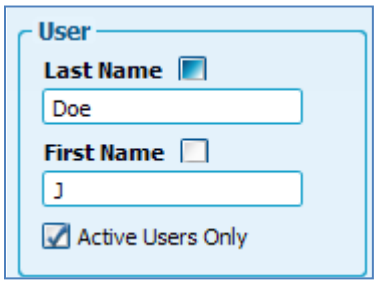
2. Under **Search Criteria**, select one or more of the following options:
   - Select one of the following **Location** options:
     - **Local Agency**
     - **Clinics**



The Local Agency option is enabled only when you are logged into the local agency level. If you selected a clinic location during the login process, only the Clinics option and the selected location are available.

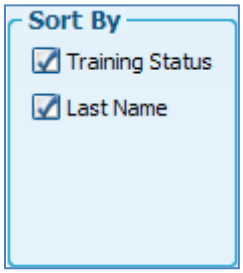
   - Enter **User** options:
     - Enter a **Last Name**.

- Enter a **First Name**.
- Uncheck **Active Users Only** to include inactive users, if necessary.

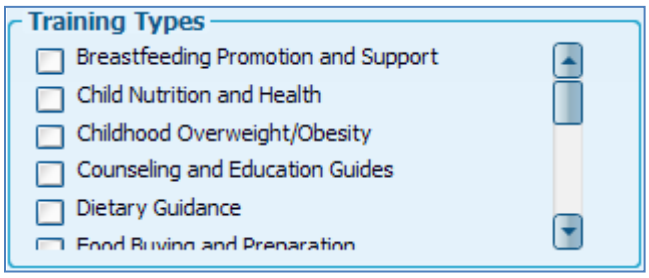


Use partial names to broaden search criteria.

- Select the **Sort By** options, as necessary.



- Select one or more **Training Type** options, as necessary.



3. Click **Search**. The **Search Results** grid displays the results of the search.

Congratulations!

You have successfully completed the **Manage Staff Training** process.

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12- DISCONNECT OPERATIONS

Data Synchronization

The Crossroads WIC application can be used on a laptop computer while disconnected from the network. The **Disconnect Clinic** screen allows you to load WIC data onto a local version of Crossroads and check out a clinic for offline use. You will then use the same screen to check the clinic back in and upload WIC data to the network version.

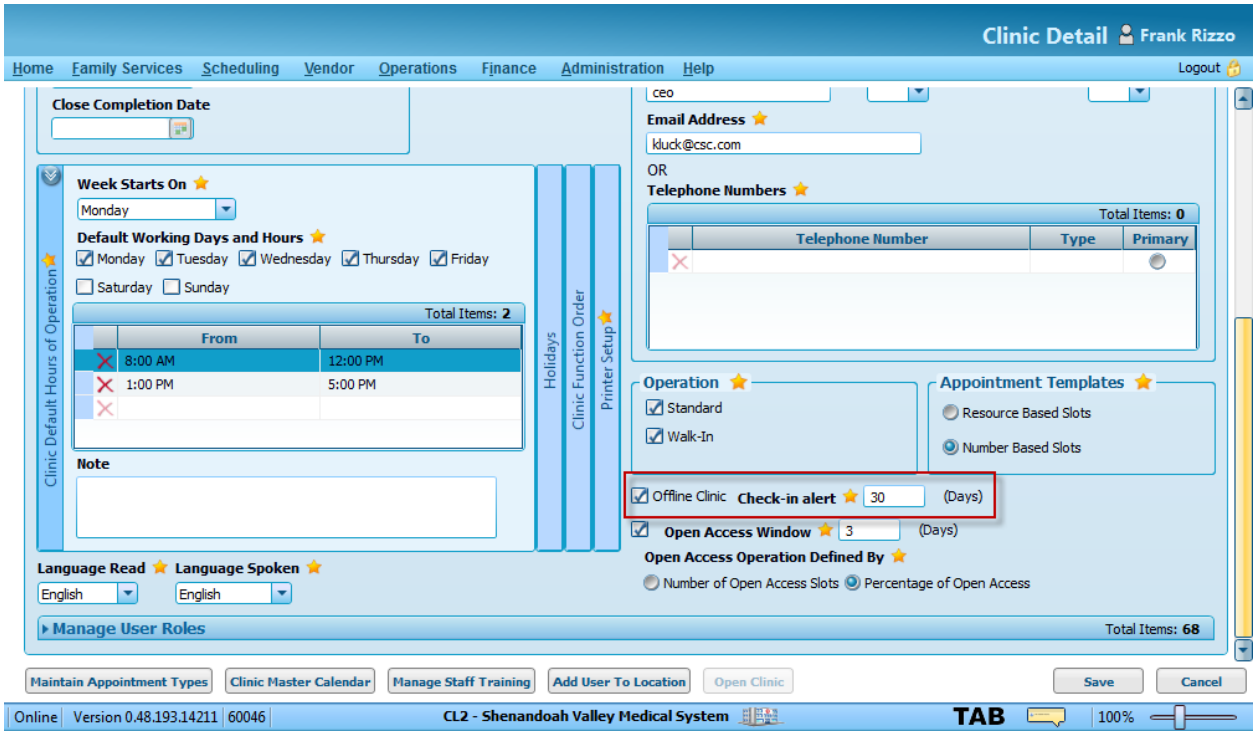
This process includes the following tasks:

Task A. Initial Configuration for a Disconnected Clinic 12-2
Task B. Checking Out a WIC Clinic 12-4
Task C. Checking In a WIC Clinic 12-10

Task A. Initial Configuration for a Disconnected Clinic

Complete the following steps to perform this task:

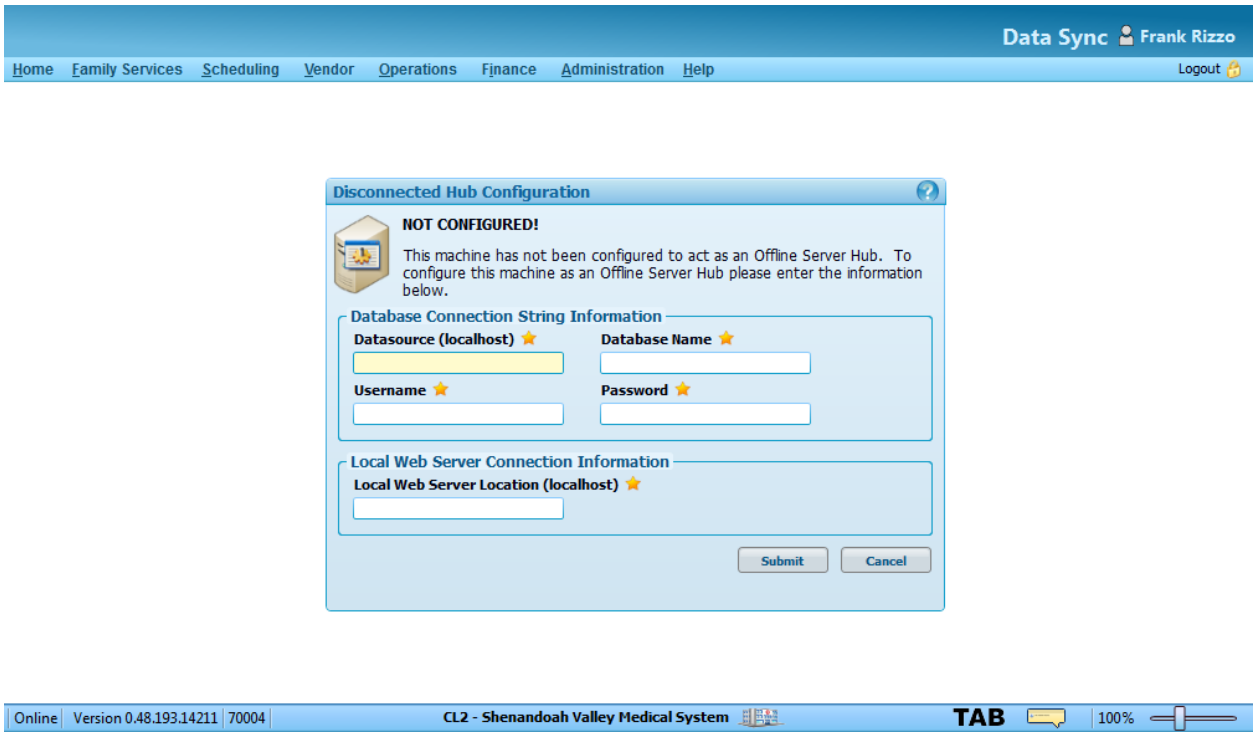
1. From the **Home** screen, go to **Operations → Setup → Maintain clinics**. The **Maintain Clinics** screen displays.
2. Search and navigate to the clinic that will work in disconnected mode. The Clinic detail screen displays.
3. Click the check box for **Offline Clinic**. The **Check-in Alert** defaults to 7 days.



4. Review the **Check-in** alert and change the default days as needed.
5. Click **Save**.

> The Clinic is now set to function as a disconnected clinic. The local PC or laptop that will serve as the Offline Server Hub will need to be configured to operate as a server.

6. With the Offline Server Hub connected to the Application with a network connection, go to **Operations → Disconnect Operations → Data Synchronization.** The **Data Sync** screen displays.



7. Complete the information on the **Disconnected Hub Configuration** screen if necessary.

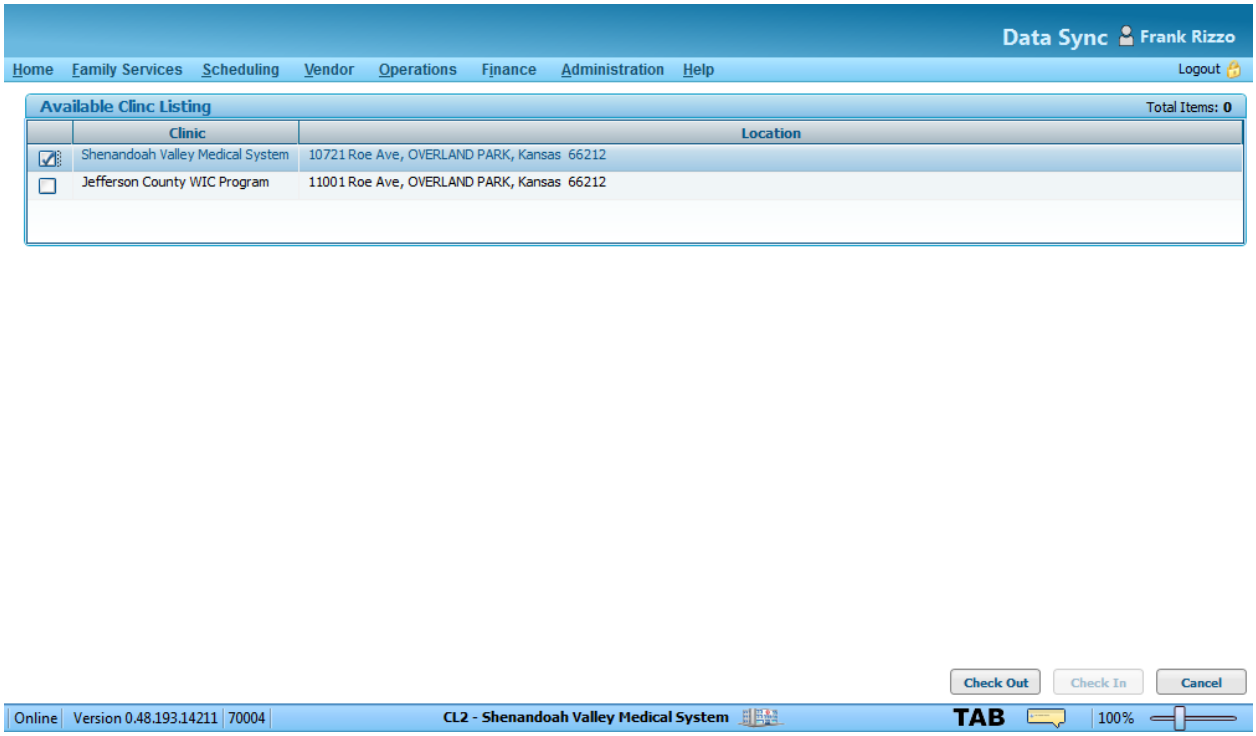
This configuration screen will need to be completed the first time visiting Data Sync. The network administrator who set up the PC to be a server will have the information of how to complete the form.

8. Click **Submit**. The PC is now configured to serve as disconnected hub.

Task B. Checking Out a WIC Clinic

Complete the following steps to perform this task:

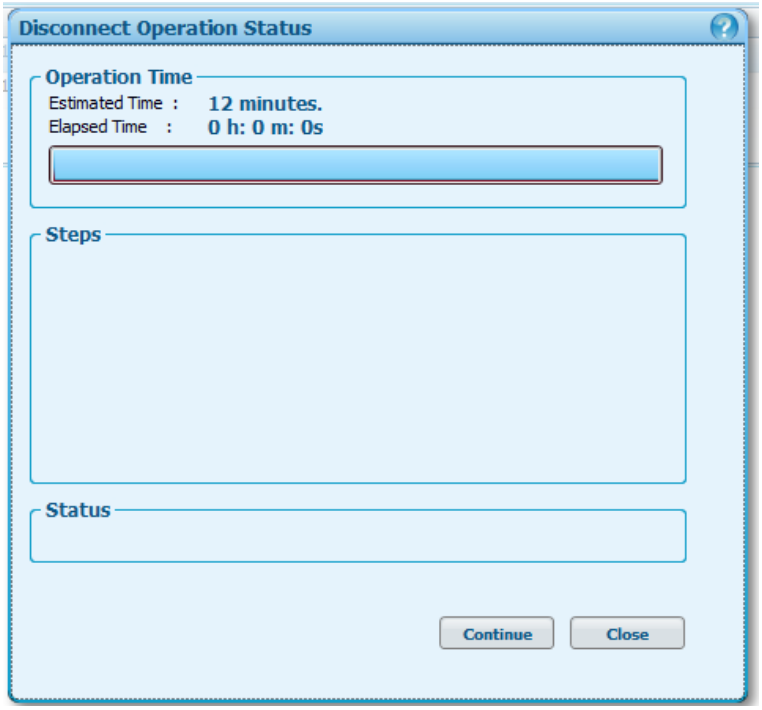
1. From the **Home** screen, go to **Operations → Disconnected Operations**. The **Data Sync** screen displays showing one or two clinics.

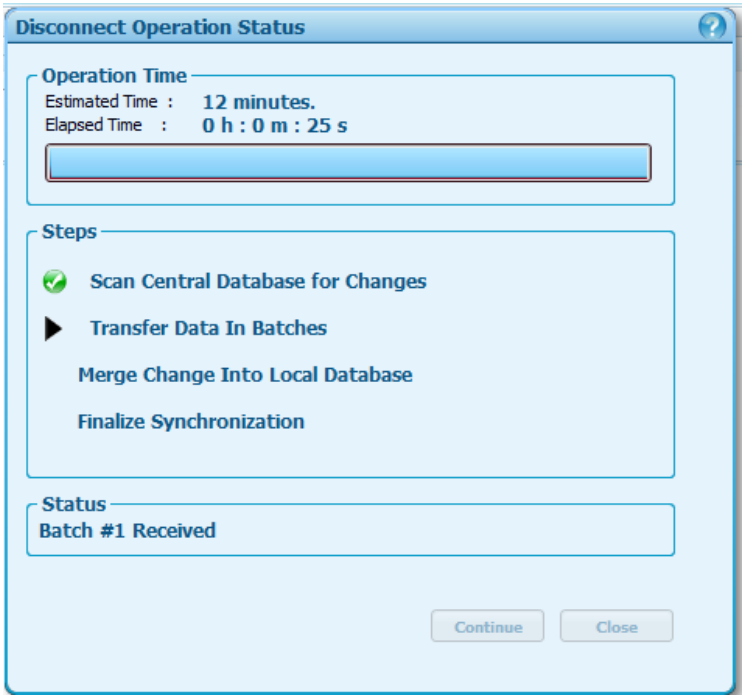


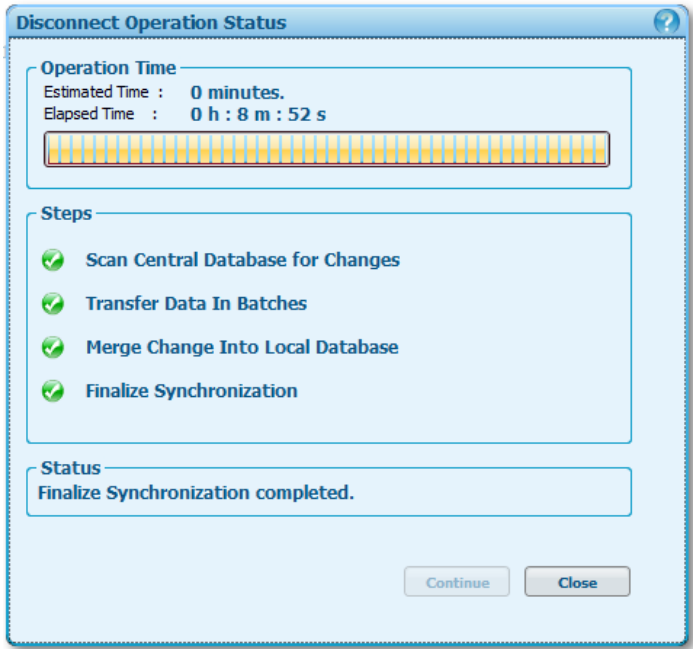
This task must be completed while connected to the network version of the Crossroads WIC application.

If the current computer is not configured to act as an Offline Server Hub but is authorized to work in disconnected mode, the Data Sync screen displays configuration information. Complete the information and click Submit.

2. Check the box to select your clinic from the list of available clinics.
3. Click **Check Out**. The **Disconnect Operation Status** displays showing progress synchronization process.

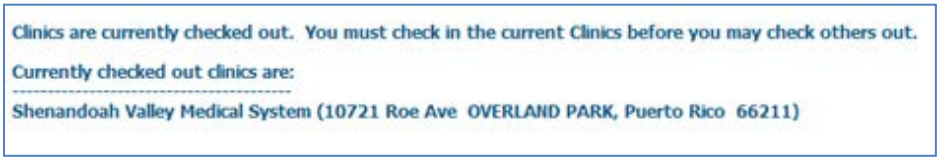




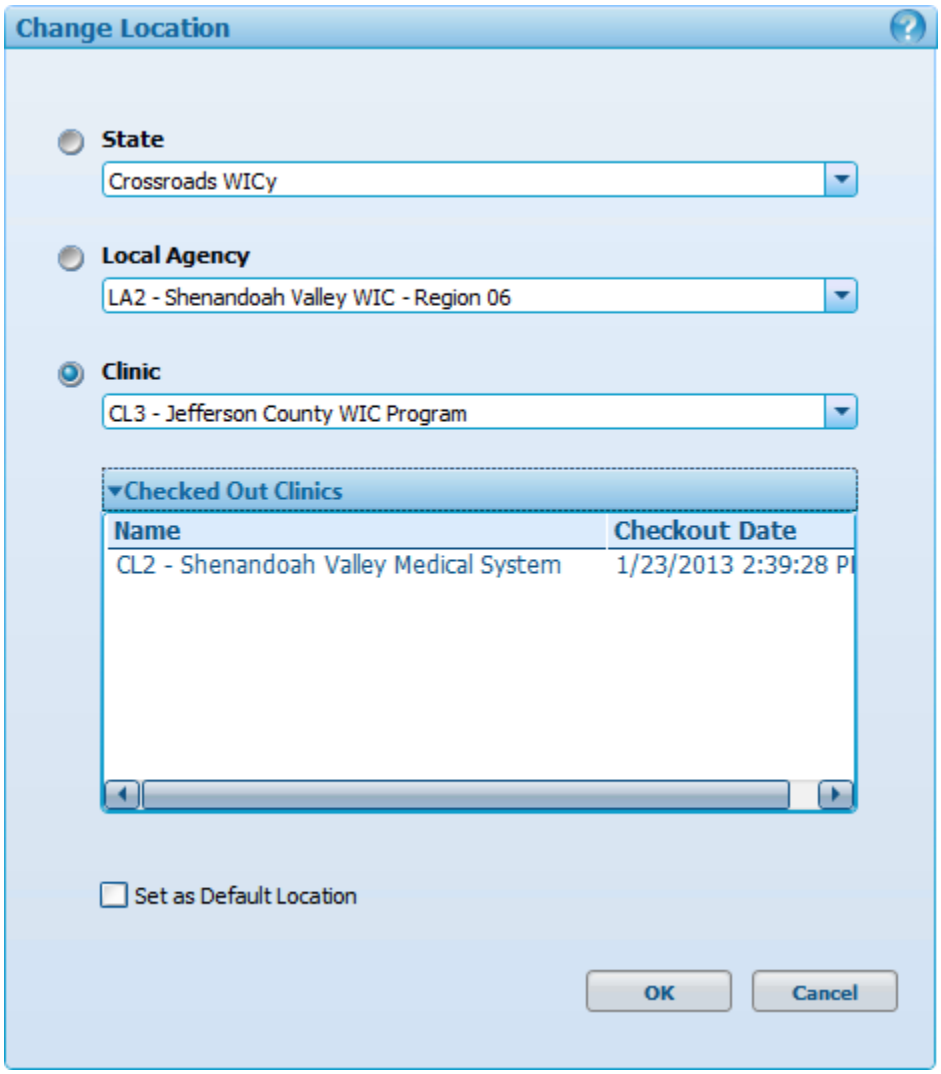


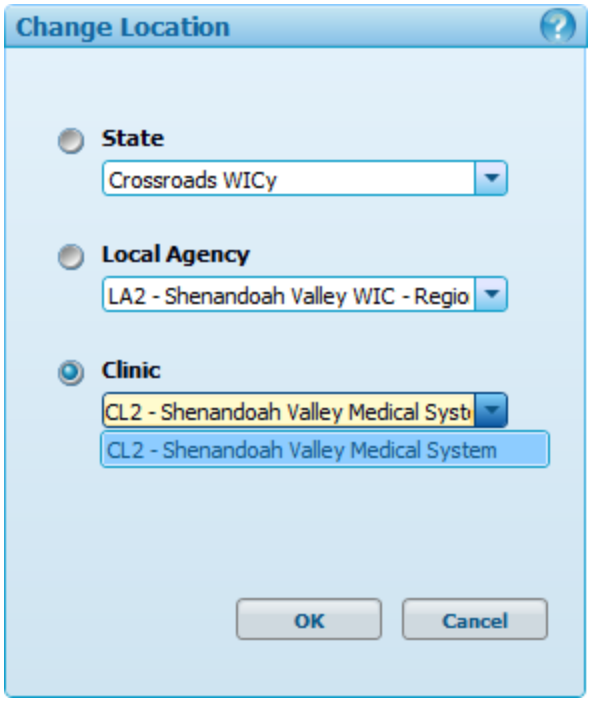
4. When the Finalize Synchronization completed displays, click **Close**. The **Log In** Screen displays showing the status of Offline in the lower left corner of the screen.

If clinics are already checked out, the following message displays.


Clinics are currently checked out. You must check in the current Clinics before you may check others out.
Currently checked out clinics are:
Shenandoah Valley Medical System (10721 Roe Ave OVERLAND PARK, Puerto Rico 66211)

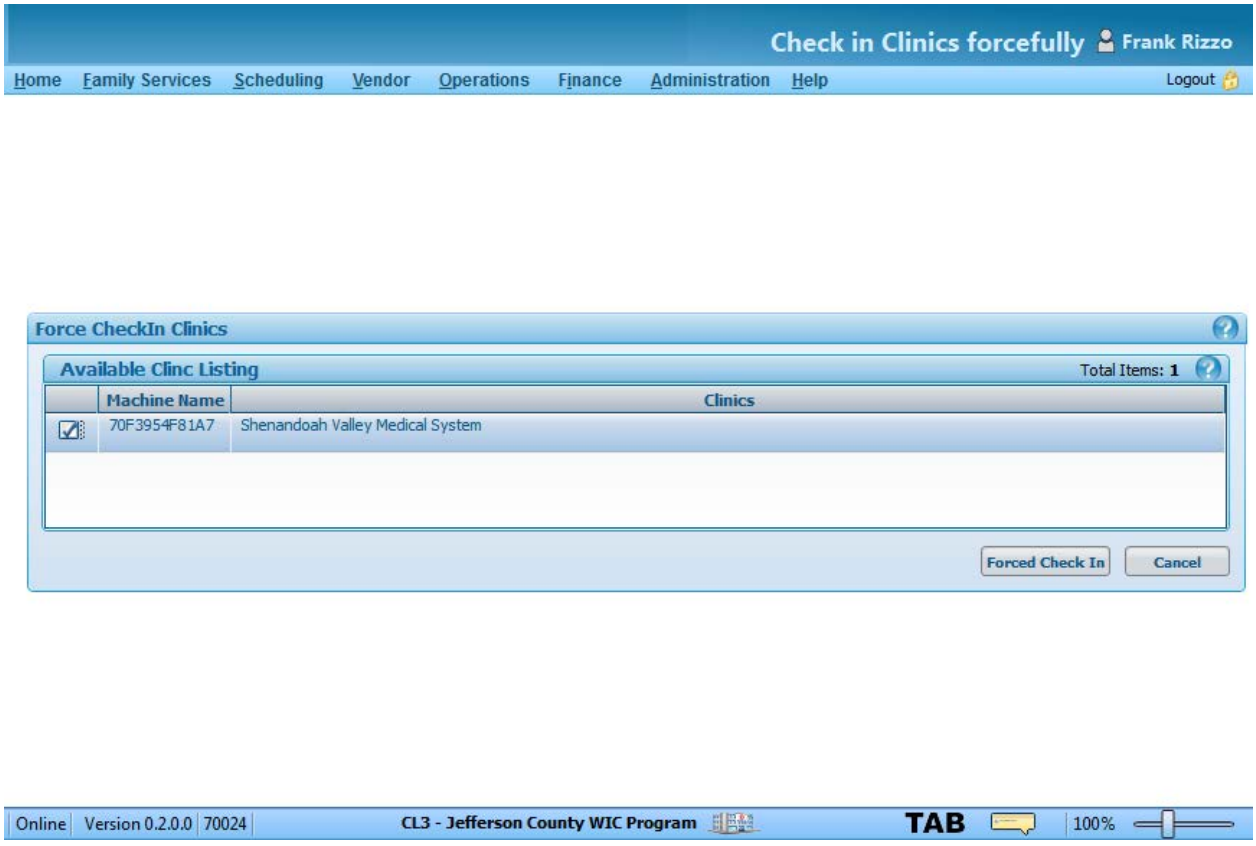
Once the clinic is checked out all other online users will see which clinics are checked out. The Offline user will only have only the checked out clinic available.





Once the clinic is checked out there a reduced number of menu choices available.

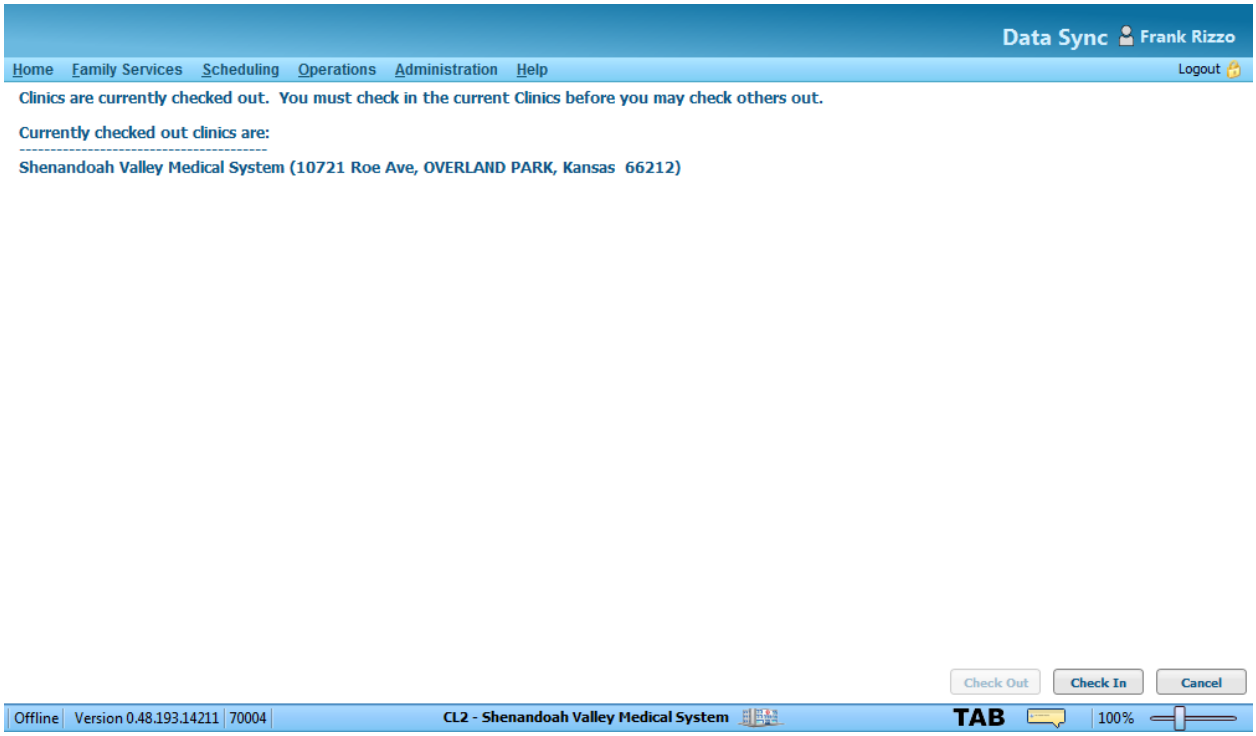
If there is a problem with the checked out clinic, an Online user with the authority can Check in the Clinic Forcefully.



Task C. Checking In a WIC Clinic

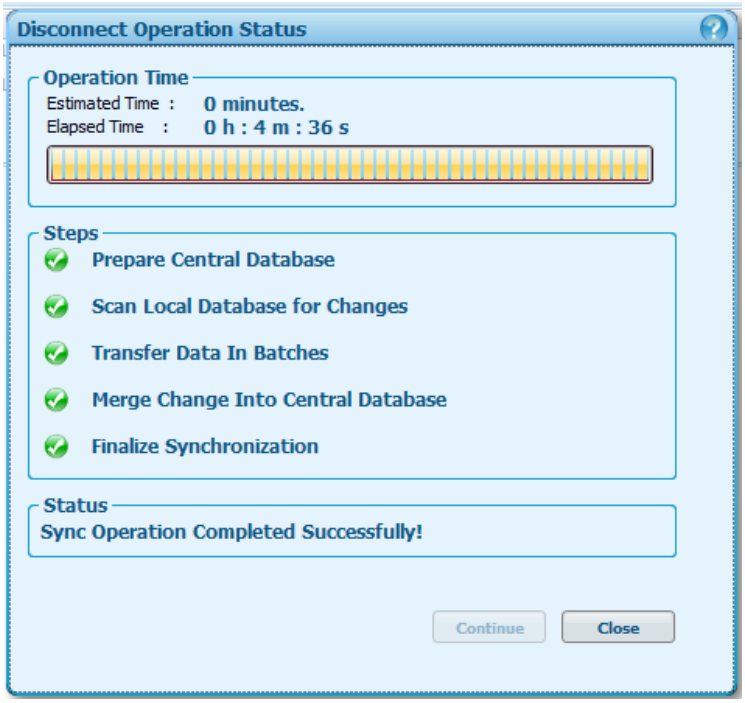
Complete the following steps to perform this task:

1. Return to the connected location. From the **Home** screen, go to **Operations → Disconnect Operations → Data Synchronization**. The **Data Sync** screen displays.



2. Click **Check In**. The **Disconnect Operation Status** screen displays until the status of Sync Operation Completed Successfully.

The selected clinic will be checked back in and data gathered while offline will be uploaded to the network version of the Crossroads WIC application.



Congratulations!

You have successfully completed the **Data Synchronization** process.

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13- CREATE SURVEY DISTRIBUTION LIST

Create Survey Distribution List

This scenario explains the process of creating a survey distribution list.

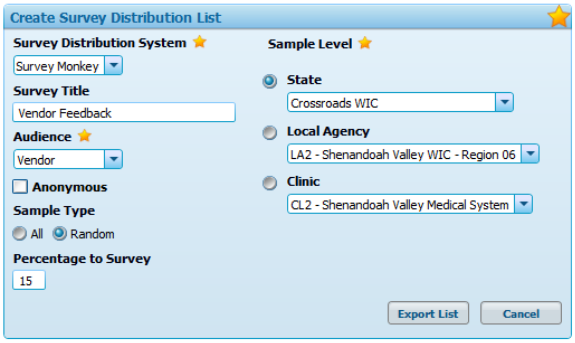
This process includes the following tasks:

Task A. Completing the Create Survey Distribution List Input Form..... 13-2
Task B. Exporting the Distribution List..... 13-4

Task A. Completing the Create Survey Distribution List Input Form

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → Survey Distribution List**. The **Create Survey Distribution List** screen displays.



2. Complete the following on the screen:
   - Select a **Survey Distribution System** that will be used.

This file can be used by external survey systems such as Survey Console, Survey Monkey, or Zoomerang to gather feedback.

The format of the output file is based on the selected Survey Distribution System.

- Enter a **Survey Title**.
- Select the survey **Audience**.
- Check **Anonymous** if survey will be anonymous.

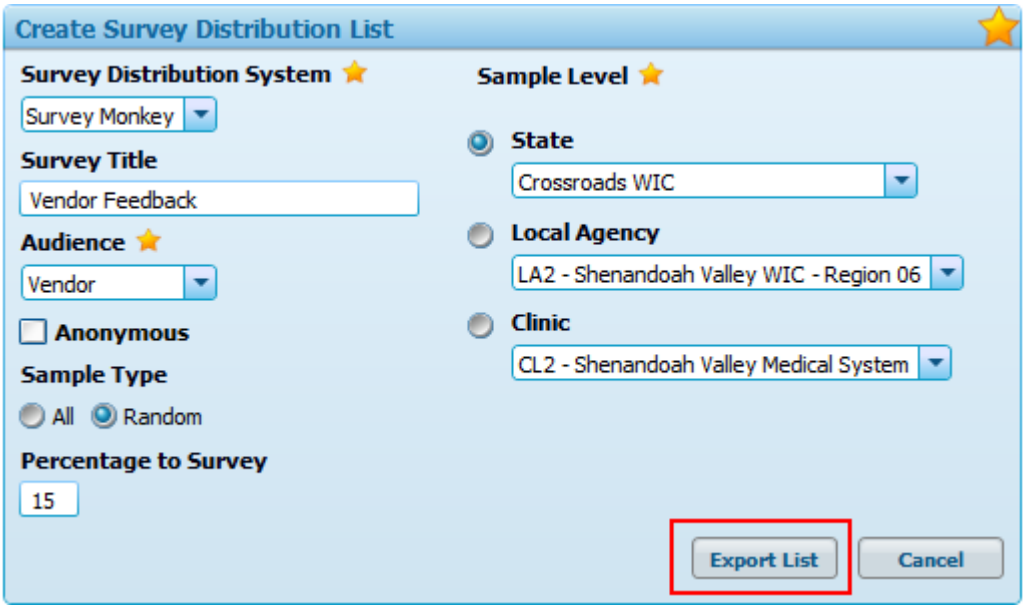
3. Under **Sample Type**, select one of the following:
   - Check **All** if the survey will be distributed to all identified in the criteria selection.
   - Check **Random** if a sample will be selected. If random is selected, the **Percentage to Survey** will become enabled: Enter between 1% and 99% for the percentage to sample.
4. Under **Sample Level**, select one of the following:
   - **State**, then select a state.
   - **Local Agency**, then select a local agency.
   - **Clinic**, then select a clinic.

The selection criteria will produce a list of survey respondents based on the selection criteria that can be used to complete the survey. The file created is a .CSV file (comma delimited format).

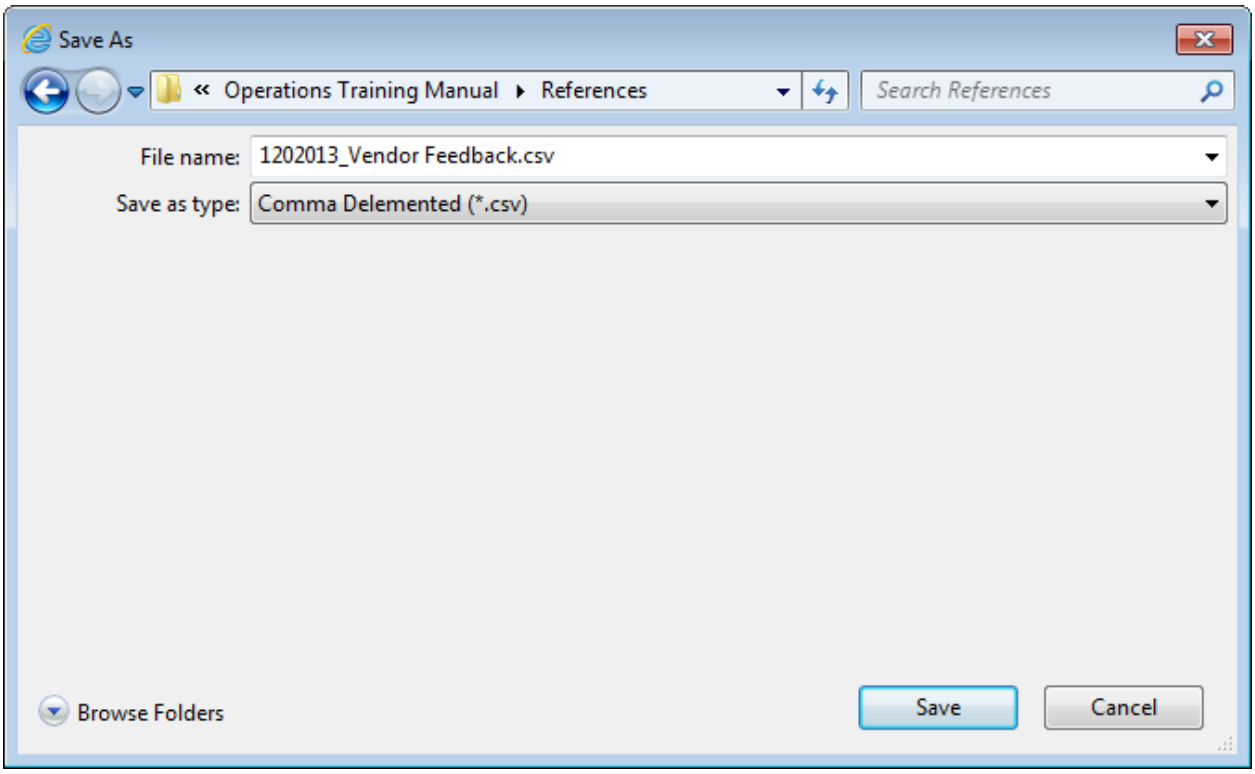
Task B. Exporting the Distribution List

Complete the following steps to perform this task:

1. When the criteria for the selection of the distribution list is complete, click **Export List**. A **Create File** screen displays.



The Create File screen will have a default file name with today's date and the name of the survey. The file created is a .CSV file (comma delimited format). This file will usually open with a spreadsheet program like Excel with the list shown in the first column. No participant or family information will be exported.



2. Navigate to the folder where you would like to save your survey distribution list.
3. Click **Save**. A status message displays indicating the list was exported successfully. You have now saved the comma delimited .csv file representing the selection criteria selected.

Congratulations!

You have successfully completed the **Create Survey Distribution List** process.

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14- EBT

Search Transactions by Clinic

The **EBT** menu allows you to search for EBT transactions and manage payments and discrepancies in the Crossroads WIC system. Use this menu to perform various tasks related to EBT.

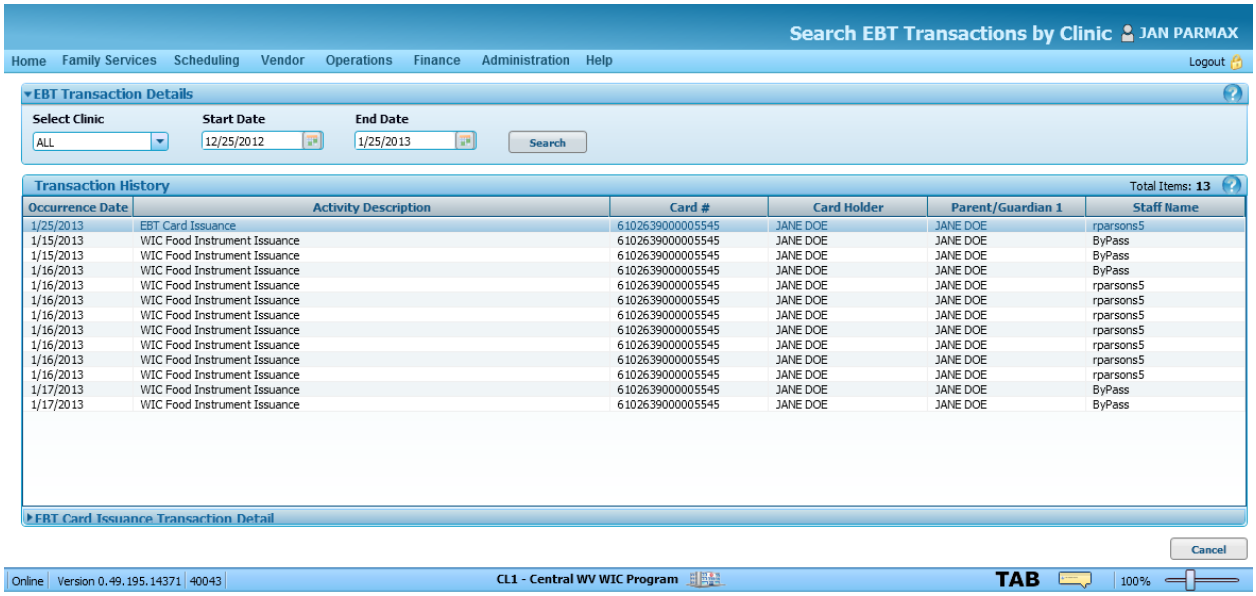
This process includes the following tasks:

Task A. Searching for EBT Transactions by Clinic 14-2

Task A. Searching for EBT Transactions by Clinic

Complete the following steps to perform this task:

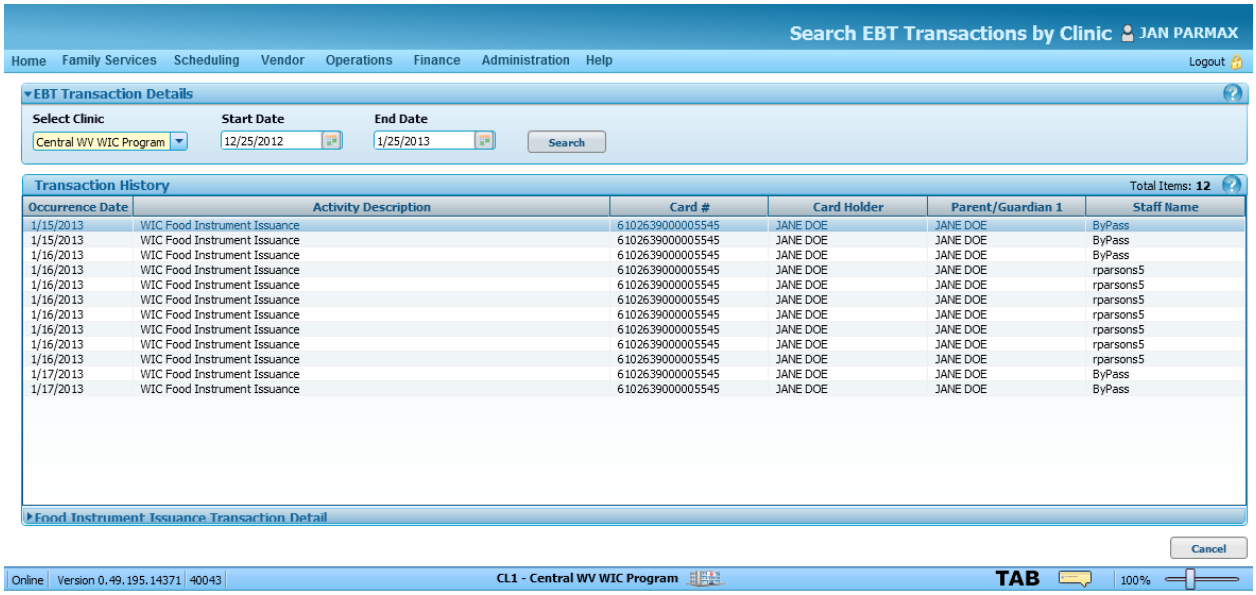
1. From the **Home** screen, go to **Operations → EBT → Search Transactions By Clinic**. The **Search EBT Transactions By Clinic** screen displays.



The Transaction History grid displays the Occurrence Date, Activity Description, Card #, Card Holder, Parent/Guardian 1, and Staff Name for all EBT transaction records.

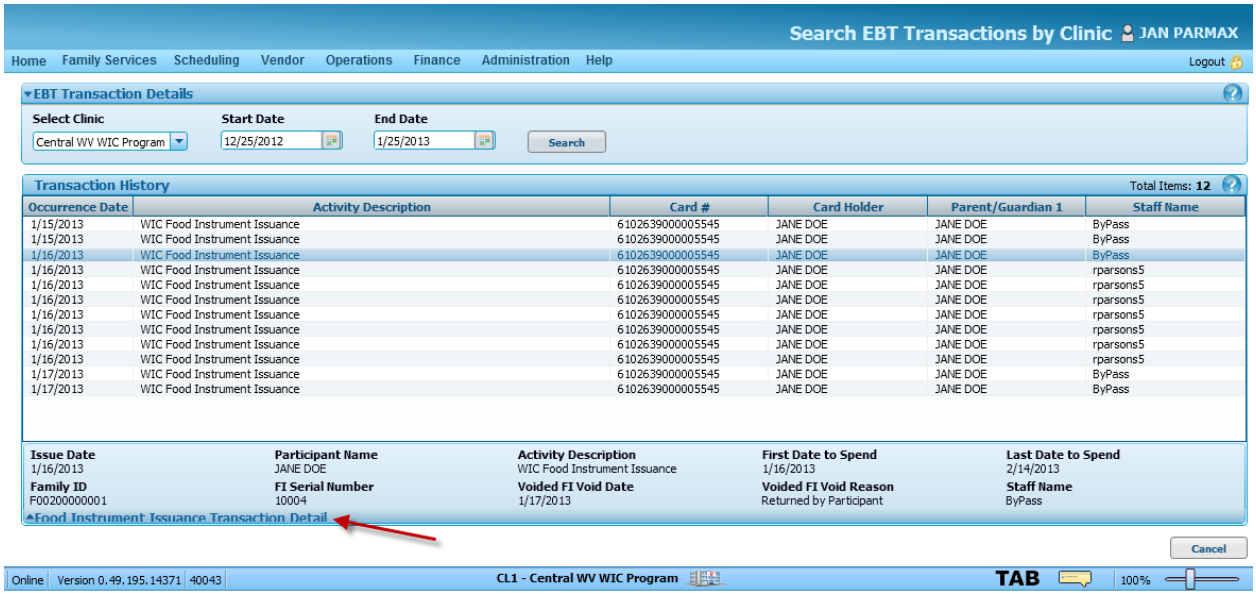
Click a column header to sort the items in the grid. Click and hold, then drag and drop columns of information to reorganize the order of the columns in the grid.

2. Under **EBT Transaction Details**, select a clinic in **Select Clinic** and/or a **Start Date** and **End Date**.


Search EBT Transactions by Clinic
JAN PARMAX
Home
Family Services
Scheduling
Vendor
Operations
Finance
Administration
Help
Logout
EBT Transaction Details
Select Clinic
Central WV WIC Program
Start Date
12/25/2012
End Date
1/25/2013
Search
Transaction History
Total Items: 12
Occurrence Date
Activity Description
Card #
Card Holder
Parent/Guardian 1
Staff Name
1/15/2013 WIC Food Instrument Issuance 6102639000005545 JANE DOE JANE DOE ByPass
1/15/2013 WIC Food Instrument Issuance 6102639000005545 JANE DOE JANE DOE ByPass
1/16/2013 WIC Food Instrument Issuance 6102639000005545 JANE DOE JANE DOE ByPass
1/16/2013 WIC Food Instrument Issuance 6102639000005545 JANE DOE JANE DOE rparsons5
1/16/2013 WIC Food Instrument Issuance 6102639000005545 JANE DOE JANE DOE rparsons5
1/16/2013 WIC Food Instrument Issuance 6102639000005545 JANE DOE JANE DOE rparsons5
1/16/2013 WIC Food Instrument Issuance 6102639000005545 JANE DOE JANE DOE rparsons5
1/16/2013 WIC Food Instrument Issuance 6102639000005545 JANE DOE JANE DOE rparsons5
1/16/2013 WIC Food Instrument Issuance 6102639000005545 JANE DOE JANE DOE rparsons5
1/17/2013 WIC Food Instrument Issuance 6102639000005545 JANE DOE JANE DOE ByPass
1/17/2013 WIC Food Instrument Issuance 6102639000005545 JANE DOE JANE DOE ByPass
Food Instrument Issuance Transaction Detail
Cancel
Online
Version 0.49.195.14371
40043
CL1 - Central WV WIC Program
TAB
100%

3. Click **Search** to filter the results displayed. The **Transaction History** grid updates and displays results based on the selection(s).

4. Select a record in the **Transaction History** grid and expand the **Food Instrument Issuance Transaction Detail** section by clicking the expand/collapse arrow.



Congratulations!

You have successfully completed the **Search Transactions by Clinic** process.

Search Transactions by Vendor

The **EBT** menu allows you to search for EBT transactions and manage payments and discrepancies in the Crossroads WIC system. Use this menu to perform various tasks related to EBT.

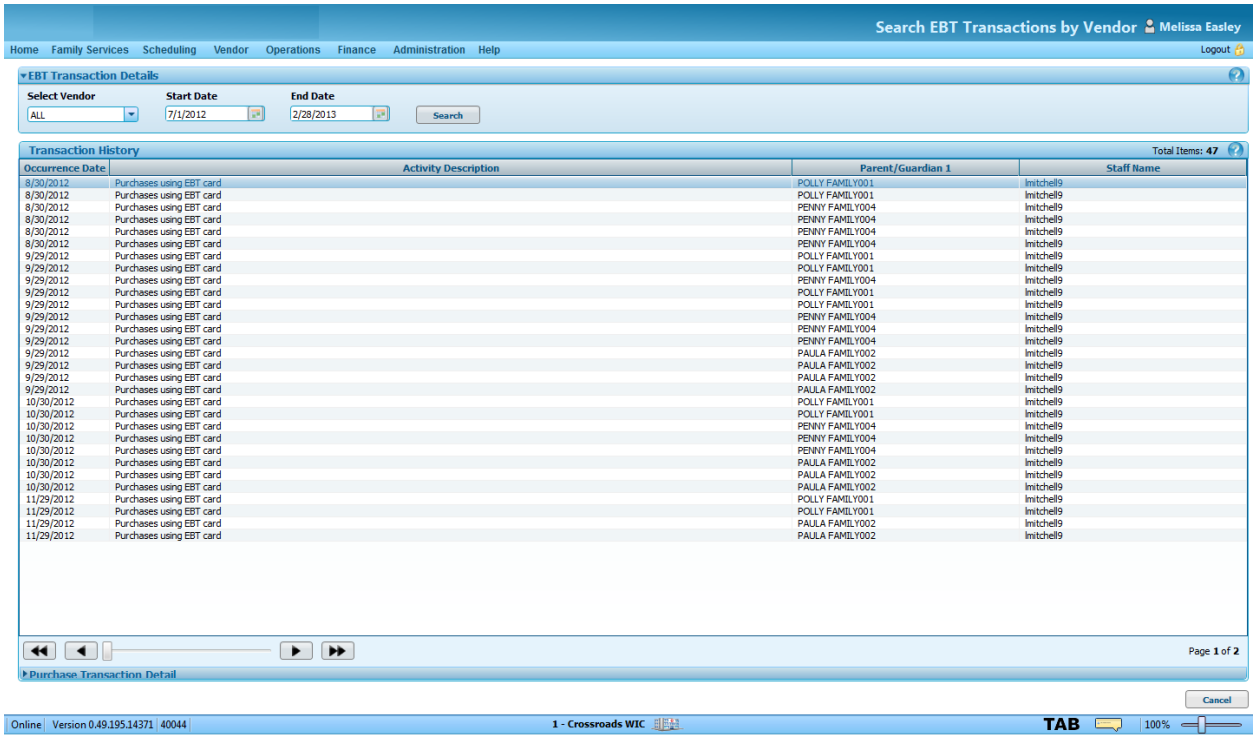
This process includes the following tasks:

Task A. Searching for EBT Transactions by Vendor..... 14-5

Task A. Searching for EBT Transactions by Vendor

Complete the following steps to perform this task:

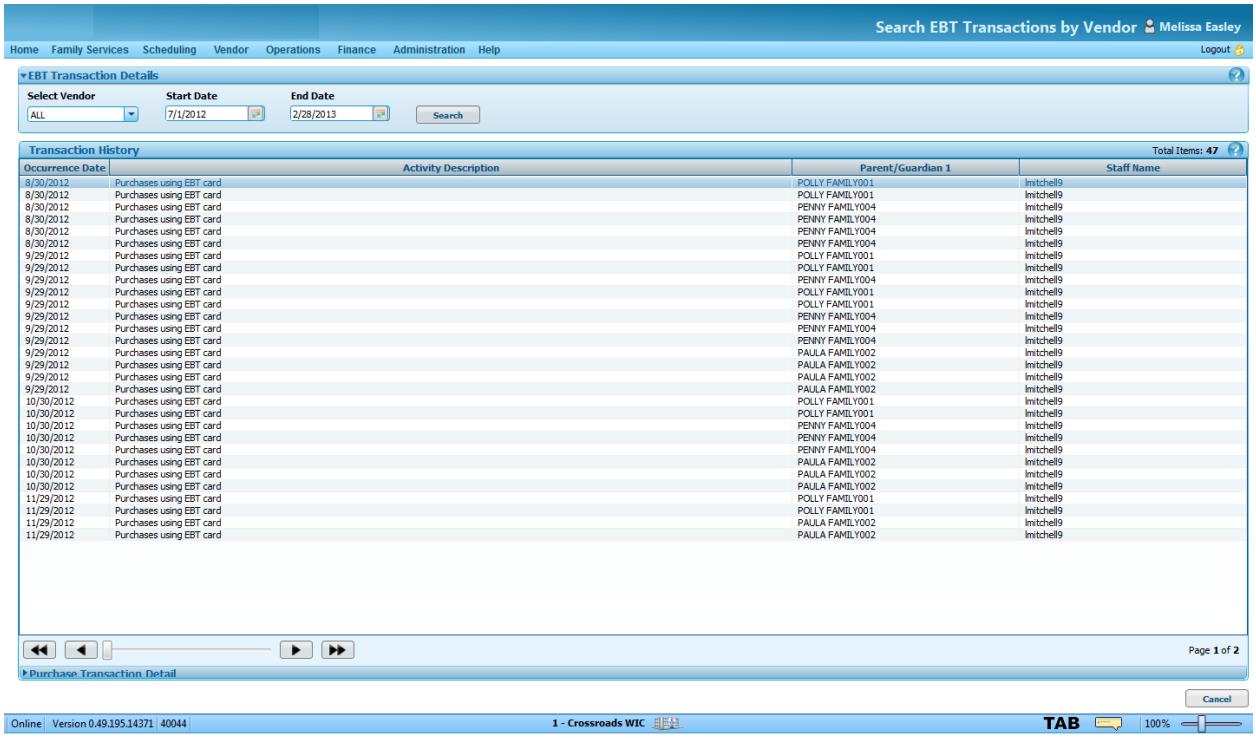
1. From the **Home** screen, go to **Operations → EBT → Search Transactions By Vendor**. The **Search EBT Transactions By Vendor** screen displays.


Search EBT Transactions by Vendor
Melissa Easley
Home
Family Services
Scheduling
Vendor
Operations
Finance
Administration
Help
Logout
EBT Transaction Details
Select Vendor
ALL
Start Date
7/1/2012
End Date
2/28/2013
Search
Transaction History
Total Items: 47
Occurrence Date
Activity Description
Parent/Guardian 1
Staff Name
8/30/2012 Purchases using EBT card POLLY FAMILY001 lmitchell9
8/30/2012 Purchases using EBT card POLLY FAMILY001 lmitchell9
8/30/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
8/30/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
8/30/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
8/30/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
9/29/2012 Purchases using EBT card POLLY FAMILY001 lmitchell9
9/29/2012 Purchases using EBT card POLLY FAMILY001 lmitchell9
9/29/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
9/29/2012 Purchases using EBT card POLLY FAMILY001 lmitchell9
9/29/2012 Purchases using EBT card POLLY FAMILY001 lmitchell9
9/29/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
9/29/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
9/29/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
9/29/2012 Purchases using EBT card PAULA FAMILY002 lmitchell9
9/29/2012 Purchases using EBT card PAULA FAMILY002 lmitchell9
9/29/2012 Purchases using EBT card PAULA FAMILY002 lmitchell9
9/29/2012 Purchases using EBT card PAULA FAMILY002 lmitchell9
10/30/2012 Purchases using EBT card POLLY FAMILY001 lmitchell9
10/30/2012 Purchases using EBT card POLLY FAMILY001 lmitchell9
10/30/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
10/30/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
10/30/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
10/30/2012 Purchases using EBT card PAULA FAMILY002 lmitchell9
10/30/2012 Purchases using EBT card PAULA FAMILY002 lmitchell9
10/30/2012 Purchases using EBT card PAULA FAMILY002 lmitchell9
11/29/2012 Purchases using EBT card POLLY FAMILY001 lmitchell9
11/29/2012 Purchases using EBT card POLLY FAMILY001 lmitchell9
11/29/2012 Purchases using EBT card PAULA FAMILY002 lmitchell9
11/29/2012 Purchases using EBT card PAULA FAMILY002 lmitchell9
Page 1 of 2
Purchase Transaction Detail
Cancel
Online
Version 0.49.195.14371
40044
1 - Crossroads WIC
TAB
100%

The Transaction History grid displays the Occurrence Date, Activity Description, Parent/Guardian 1, and Staff Name for all EBT transaction records.

Click a column header to sort the items in the grid. Click and hold, then drag and drop columns of information to reorganize the order of the columns in the grid.

2. Under **EBT Transaction Details**, select a clinic in **Select Clinic** and/or a **Start Date** and **End Date**.
3. Click **Search** to filter the results displayed. The **Transaction History** grid updates and displays results based on the selection(s).


Search EBT Transactions by Vendor
Melissa Easley
Home
Family Services
Scheduling
Vendor
Operations
Finance
Administration
Help
Logout
EBT Transaction Details
Select Vendor
ALL
Start Date
7/1/2012
End Date
2/28/2013
Search
Transaction History
Total Items: 47
Occurrence Date
Activity Description
Parent/Guardian 1
Staff Name
8/30/2012 Purchases using EBT card POLLY FAMILY001 lmitchell9
8/30/2012 Purchases using EBT card POLLY FAMILY001 lmitchell9
8/30/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
8/30/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
8/30/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
8/30/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
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9/29/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
9/29/2012 Purchases using EBT card POLLY FAMILY001 lmitchell9
9/29/2012 Purchases using EBT card POLLY FAMILY001 lmitchell9
9/29/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
9/29/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
9/29/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
9/29/2012 Purchases using EBT card PAULA FAMILY002 lmitchell9
9/29/2012 Purchases using EBT card PAULA FAMILY002 lmitchell9
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10/30/2012 Purchases using EBT card POLLY FAMILY001 lmitchell9
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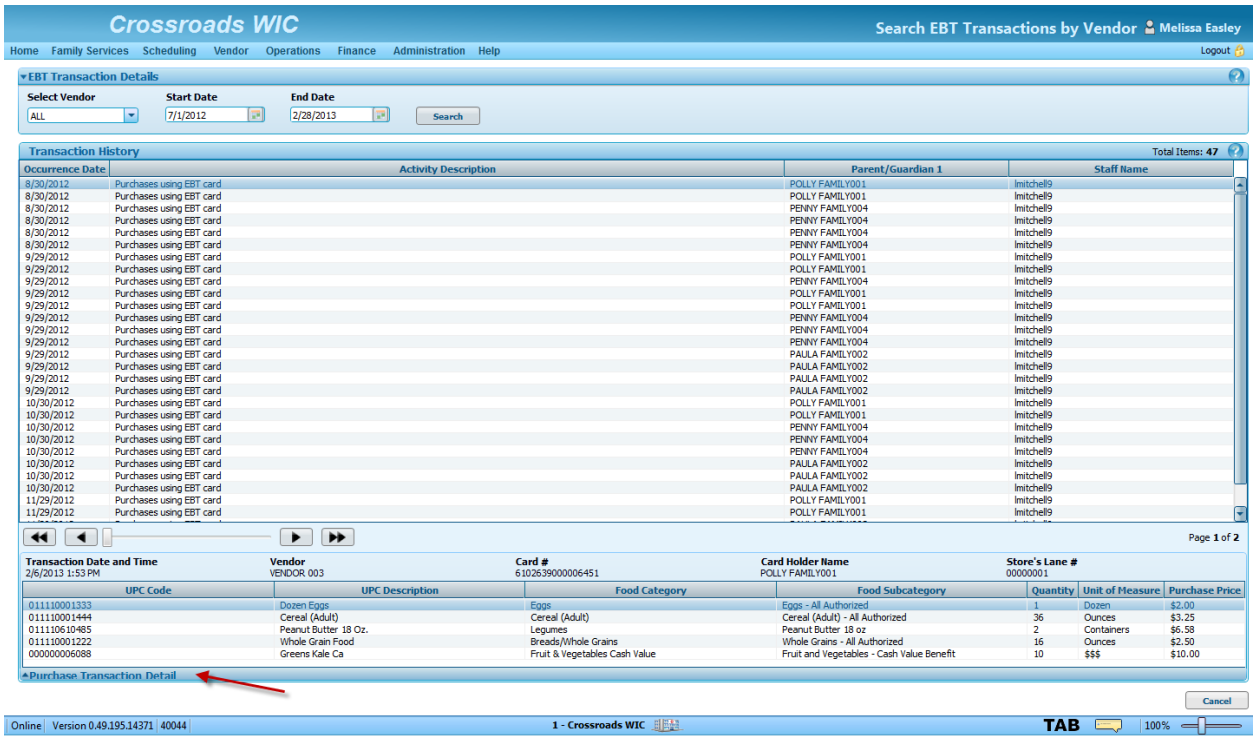
10/30/2012 Purchases using EBT card PAULA FAMILY002 lmitchell9
11/29/2012 Purchases using EBT card POLLY FAMILY001 lmitchell9
11/29/2012 Purchases using EBT card POLLY FAMILY001 lmitchell9
11/29/2012 Purchases using EBT card PAULA FAMILY002 lmitchell9
11/29/2012 Purchases using EBT card PAULA FAMILY002 lmitchell9
Page 1 of 2
Purchase Transaction Detail
Cancel
Online
Version 0.49.195.14371 40044
1 - Crossroads WIC
TAB
100%

4. Select a record in the **Transaction History** grid and expand the **Purchase Transaction Detail** section by clicking the expand/collapse arrow.


Crossroads WIC
Search EBT Transactions by Vendor
Melissa Easley
Home
Family Services
Scheduling
Vendor
Operations
Finance
Administration
Help
Logout
EBT Transaction Details
Select Vendor
ALL
Start Date
7/1/2012
End Date
2/28/2013
Search
Transaction History
Total Items: 47
Occurrence Date
Activity Description
Parent/Guardian 1
Staff Name
8/30/2012 Purchases using EBT card POLLY FAMILY001 lmitchell9
8/30/2012 Purchases using EBT card POLLY FAMILY001 lmitchell9
8/30/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
8/30/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
8/30/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
8/30/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
9/29/2012 Purchases using EBT card POLLY FAMILY001 lmitchell9
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9/29/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
9/29/2012 Purchases using EBT card POLLY FAMILY001 lmitchell9
9/29/2012 Purchases using EBT card POLLY FAMILY001 lmitchell9
9/29/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
9/29/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
9/29/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
9/29/2012 Purchases using EBT card PAULA FAMILY002 lmitchell9
9/29/2012 Purchases using EBT card PAULA FAMILY002 lmitchell9
9/29/2012 Purchases using EBT card PAULA FAMILY002 lmitchell9
9/29/2012 Purchases using EBT card PAULA FAMILY002 lmitchell9
10/30/2012 Purchases using EBT card POLLY FAMILY001 lmitchell9
10/30/2012 Purchases using EBT card POLLY FAMILY001 lmitchell9
10/30/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
10/30/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
10/30/2012 Purchases using EBT card PENNY FAMILY004 lmitchell9
10/30/2012 Purchases using EBT card PAULA FAMILY002 lmitchell9
10/30/2012 Purchases using EBT card PAULA FAMILY002 lmitchell9
10/30/2012 Purchases using EBT card PAULA FAMILY002 lmitchell9
11/29/2012 Purchases using EBT card POLLY FAMILY001 lmitchell9
11/29/2012 Purchases using EBT card POLLY FAMILY001 lmitchell9
Page 1 of 2
Transaction Date and Time
2/6/2013 1:53 PM
Vendor
VENDOR 003
Card #
6102639000006451
Card Holder Name
POLLY FAMILY001
Store's Lane #
00000001
UPC Code
UPC Description
Food Category
Food Subcategory
Quantity
Unit of Measure
Purchase Price
011110001333 Dozen Eggs Eggs Eggs - All Authorized 1 Dozen $2.00
011110001444 Cereal (Adult) Cereal (Adult) Cereal (Adult) - All Authorized 36 Ounces $3.25
011110610485 Peanut Butter 18 Oz. Legumes Peanut Butter 18 oz 2 Containers $6.58
011110001222 Whole Grain Food Breads/Whole Grains Whole Grains - All Authorized 16 Ounces $2.50
000000006088 Greens Kale Ca Fruit & Vegetables Cash Value Fruit and Vegetables - Cash Value Benefit 10 $$$ $10.00
Purchase Transaction Detail
Cancel
Online
Version 0.49.195.14371
40044
1 - Crossroads WIC
TAB
100%

Congratulations!

You have successfully completed the **Search Transactions by Vendor** process.

Request ACH Payment

The **EBT** menu allows you to search for EBT transactions and manage payments and discrepancies in the Crossroads WIC system. Use this menu to perform various tasks related to EBT.

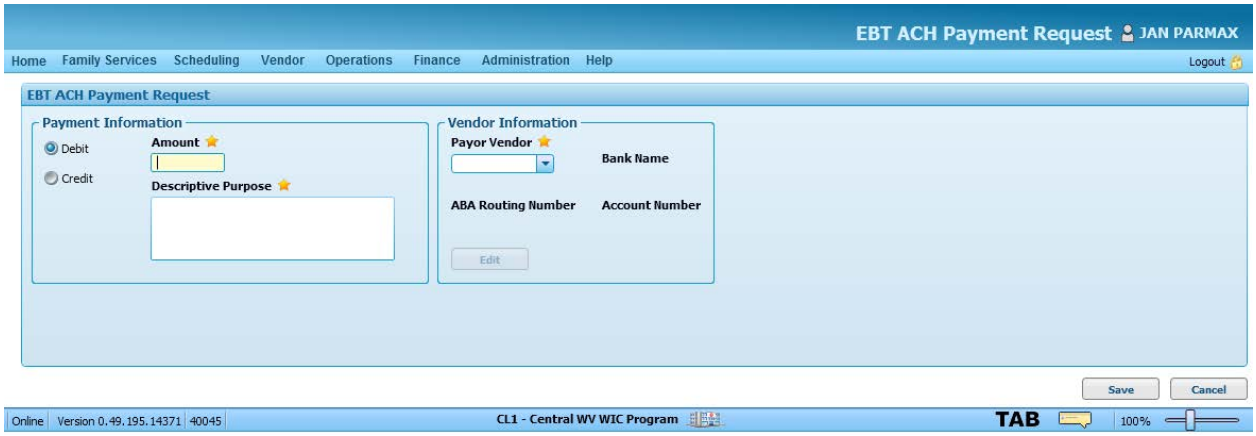
This process includes the following tasks:

Task A. Requesting an ACH Payment 14-9

Task A. Requesting an ACH Payment

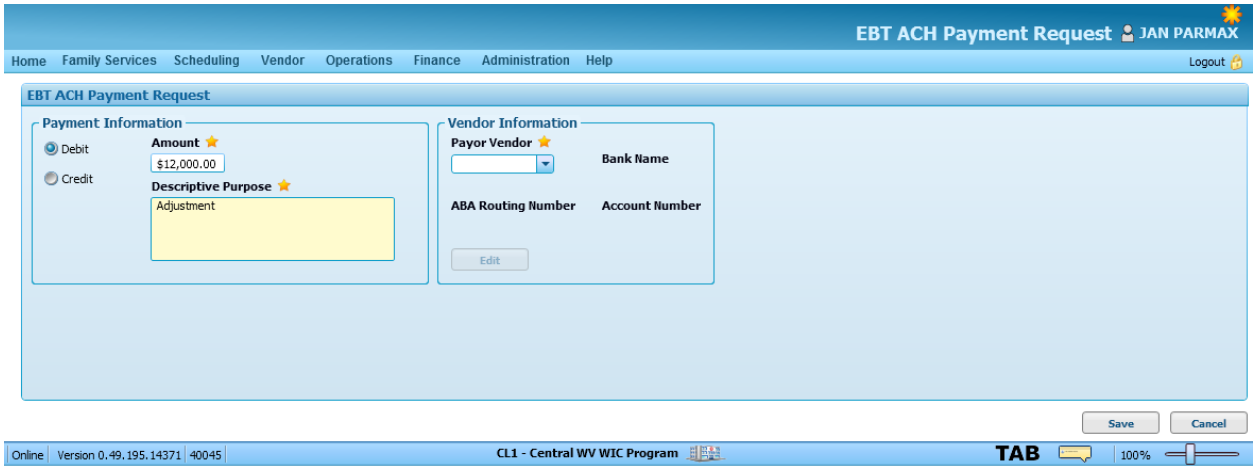
Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → EBT → Request ACH Payment**. The **EBT ACH Payment Request** screen displays.



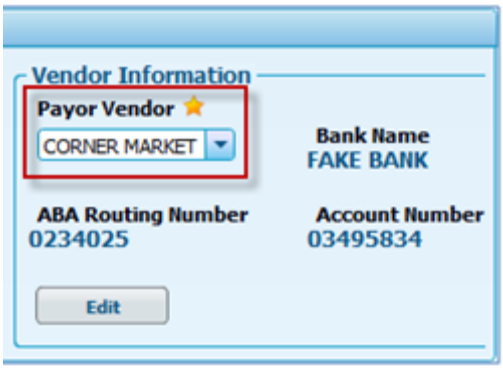
The EBT ACH Payment Request screen can be also be accessed using a different method from the Home screen. Go to Operations → EBT → Override Payment and click ACH Payment Request.

2. Under **Payment Information**, complete the following:
   - Select **Debit** or **Credit** to indicate that this payment is a debit or credit.
   - Enter the **Amount**.
   - Enter **Descriptive Purpose**.



3. Under **Vendor Information**, select the **Payor Vendor**.

When the Payor Vendor is selected, the Bank Name, ABA Routing Number, and Account Number are displayed. Click Edit to update the details for the payor vendor as needed.



Click Edit to update the details for the payor vendor as needed. After updating the information, click OK.

4. Click **Save**. The **EBT Override Payment Review** screen and a status message display.

Congratulations!

You have successfully completed the **Request ACH Payment** process.

Override Payment

The **EBT** menu allows you to search for EBT transactions and manage payments and discrepancies in the Crossroads WIC system. Use this menu to perform various tasks related to EBT.

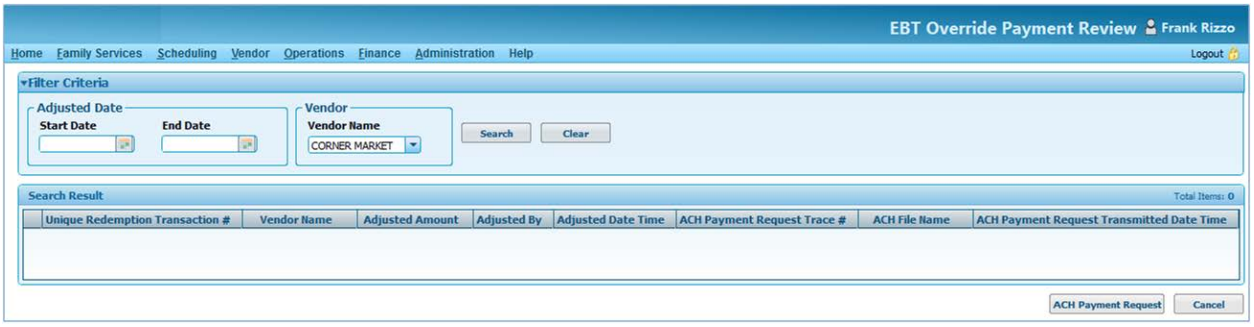
This process includes the following tasks:

Task A. Overriding a Payment 14-12

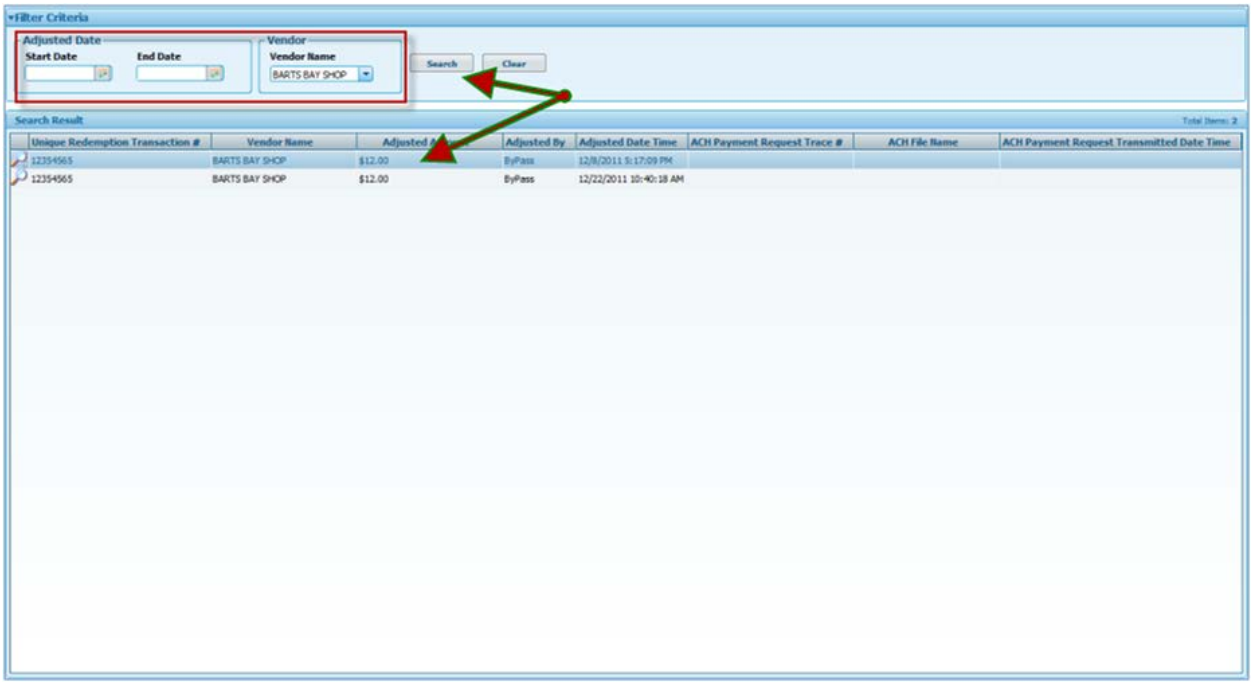
Task A. Overriding a Payment

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → EBT → Override Payment**. The **EBT Override Payment Review** screen displays.



2. Under **Filter Criteria**, enter or select the **Start Date** and **End Date** and/or the **Vendor Name** to search for EBT override payment records. The screen refreshes and displays the results in the **Search Result** grid.



The Search Result grid displays the Unique Redemption Transaction #, Vendor Name, Adjustment Amount, Adjusted By, Adjusted Date Time, ACH Payment Request Trace #, ACH File Name, and ACH Payment Request Transmitted Date Time for all EBT transaction record that match the specified filter.

Click a column header to sort the items in the grid. Click and hold, then drag and drop columns of information to reorganize the order of the columns in the grid.

Click the View button ( ) to view the details of an existing record as needed.

Click ACH Payment Request to request an ACH payment. (For details, refer to the Requesting an ACH Payment scenario.)

Congratulations!

You have successfully completed the **Override Payment** process.

Search Benefit Reconciliation Exception

The **EBT** menu allows you to search for EBT transactions and manage payments and discrepancies in the Crossroads WIC system. Use this menu to perform various tasks related to EBT.

This process includes the following tasks:

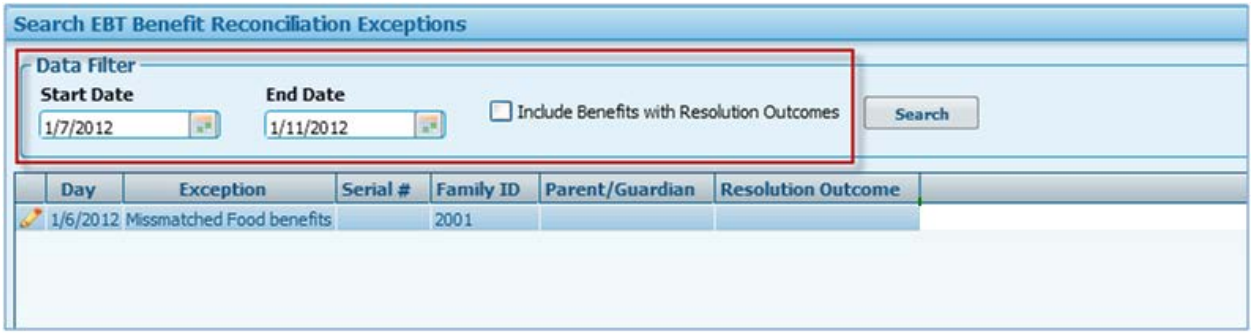
Task A. Searching for and Modifying a Benefit Reconciliation Exception 14-15

Task A. Searching for and Modifying a Benefit Reconciliation Exception

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → EBT → Search Benefit Reconciliation Exception**. The **Search EBT Benefit Reconciliation Exception** screen displays.

2. Under **Data Filter**, enter or select the **Start Date** and **End Date** and select **Include Benefits with Resolution Outcomes** as needed to search for EBT benefit reconciliation exception records. The screen refreshes and displays the results in the results grid.



3. Click the **Edit** button ( ) to modify the EBT benefit reconciliation exception record. The **Reconciliation Exception Details** screen displays.

4. Select the **Resolution Outcome**.
5. Click **Save**. A status message displays.

Congratulations!

You have successfully completed the **Search Benefit Reconciliation Exception** process.

Redemption Discrepancies

The **EBT** menu allows you to search for EBT transactions and manage payments and discrepancies in the Crossroads WIC system. Use this menu to perform various tasks related to EBT.

This process includes the following tasks:

Task A. Viewing EBT Redemption Discrepancies 14-18

Task A. Viewing EBT Redemption Discrepancies

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → EBT → Redemption Discrepancies**. The **EBT Redemption Discrepancies** screen displays.

The EBT Redemption Discrepancies grid displays the Fictional Participant ID, Family ID, Name, Participation Month, Discrepancy Reason, for all EBT redemption discrepancies.

Click a column header to sort the items in the grid. Click and hold, then drag and drop columns of information to reorganize the order of the columns in the grid.

Congratulations!

You have successfully completed the **Redemption Discrepancies** process.

Food Override Tool

The **EBT** menu allows you to search for EBT transactions and manage payments and discrepancies in the Crossroads WIC system. Use this menu to perform various tasks related to EBT.

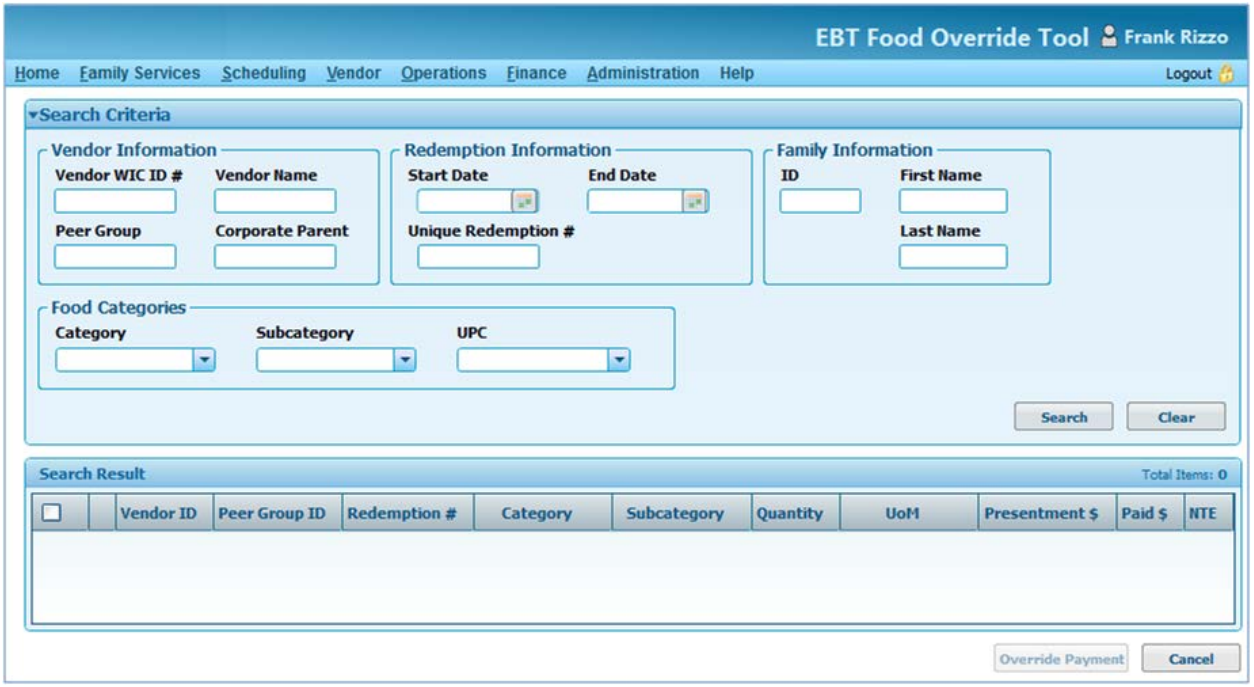
This process includes the following tasks:

Task A. Using the EBT Food Override Tool 14-20

Task A. Using the EBT Food Override Tool

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → EBT → Food Override Tool**. The **EBT Food Override Tool** screen displays.



2. Under **Search Criteria**, complete information in one or more of the following sections:

   Under **Vendor Information**, complete the following to perform a search by vendor:

   - Enter the **Vendor WIC ID #**.
   - Enter the **Vendor Name**.
   - Enter the **Peer Group**.
   - Enter the **Corporate Parent**.

   Under **Redemption Information**, complete the following to perform a search by vendor:

   - Select or enter the **Start Date**.
   - Select or enter the **End Date**.
   - Enter the **Unique Redemption #**.

   Under **Family Information**, complete the following to perform a search by vendor:

   - Enter the **ID**.
   - Enter the **First Name**.
   - Enter the **Last Name**.

   Under **Food Categories**, complete the following to perform a search by vendor:

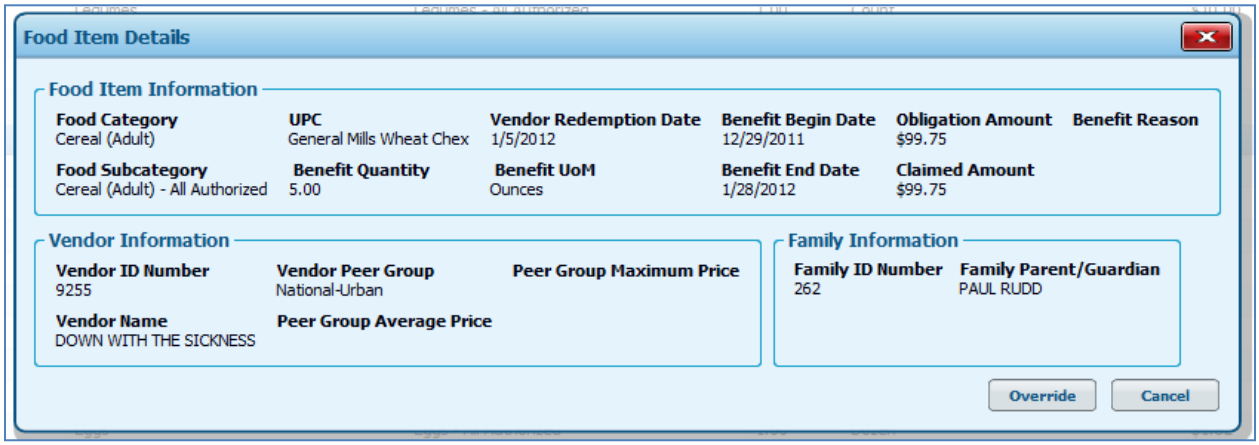
- Select the **Category**.
- Select the **Subcategory**.
- Select the **UPC**.

3. Click **Search** to filter the results displayed. The **Search Result** grid updates and displays results based on the filter criteria.

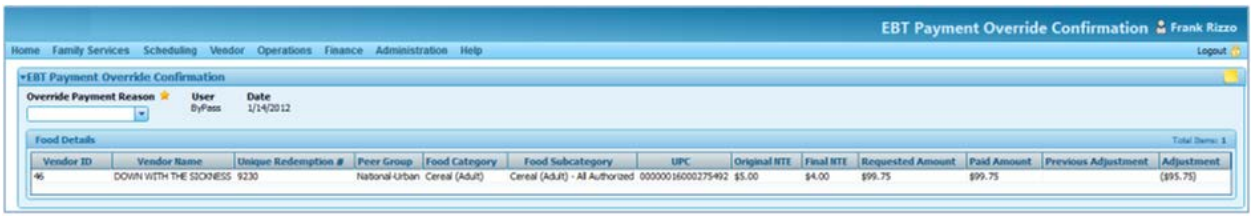
The Search Result grid displays the Vendor ID, Peer Group ID, Redemption #, Category, Subcategory, Quantity, UoM, Presentment $, Paid $, and NTE for all food items that match the specified filter criteria.

Click a column header to sort the items in the grid. Click and hold, then drag and drop columns of information to reorganize the order of the columns in the grid.

4. Click the **View** button ( ) to view the details of an existing food item record as needed. The **Food Item Details** screen displays.



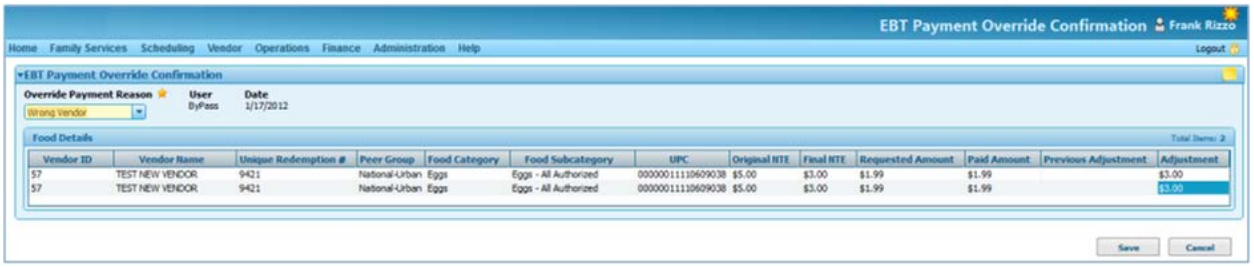
5. Click **Override** to override the food item. The **EBT Payment Override Confirmation** screen displays.


EBT Payment Override Confirmation
Frank Rizzo
Home Family Services Scheduling Vendor Operations Finance Administration Help
Logout
EBT Payment Override Confirmation
Override Payment Reason
User
ByPass
Date
1/14/2012
Food Details
Vendor ID Vendor Name Unique Redemption # Peer Group Food Category Food Subcategory UPC Original NTE Final NTE Requested Amount Paid Amount Previous Adjustment Adjustment
46 DOWN WITH THE SICKNESS 9230 National-Urban Cereal (Adult) Cereal (Adult) - All Authorized 0000001600027549 2 $5.00 $4.00 $99.75 $99.75 ($95.75)

6. Select the **Override Payment Reason**.
7. Click **Save**. A status message displays.
8. If multiple transactions need to be overridden for the same reason, on the **EBT Food Override Tool** screen select the check box for each record to override in the **Search Result** grid.

Search Result
Vendor ID Peer Group ID Redemption # Category Subcategory Quantity UoM Presentment $ Paid $ NTE
57 1 9421 Eggs Eggs - All Authorized 1.00 Dozen $1.99 $1.99 0.00
57 1 9421 Eggs Eggs - All Authorized 1.00 Dozen $1.99 $1.99 0.00
57 1 9448 Eggs Eggs - All Authorized 1.00 Dozen $1.82 $1.82 0.00
57 1 9448 Eggs Eggs - All Authorized 1.00 Dozen $1.82 $1.82 0.00
57 1 9448 Eggs Eggs - All Authorized 1.00 Dozen $1.82 $1.82 0.00
57 1 9448 Eggs Eggs - All Authorized 1.00 Dozen $1.82 $1.82 0.00

9. Click **Override Payment**. The **EBT Payment Override Confirmation** screen displays.


EBT Payment Override Confirmation
Frank Rizzo
Home Family Services Scheduling Vendor Operations Finance Administration Help
Logout
EBT Payment Override Confirmation
Override Payment Reason
Wrong Vendor
User
ByPass
Date
1/17/2012
Food Details
Vendor ID Vendor Name Unique Redemption # Peer Group Food Category Food Subcategory UPC Original NTE Final NTE Requested Amount Paid Amount Previous Adjustment Adjustment
57 TEST NEW VENDOR 9421 National-Urban Eggs Eggs - All Authorized 0000001111060903 8 $5.00 $3.00 $1.99 $1.99 $3.00
57 TEST NEW VENDOR 9421 National-Urban Eggs Eggs - All Authorized 0000001111060903 8 $5.00 $3.00 $1.99 $1.99 $3.00
Save
Cancel

10. Select the **Override Payment Reason**.
11. Click **Save**. A status message displays.

Congratulations!

You have successfully completed the **Food Override Tool** process.

15- SETUP

Maintain Appointment Types

The purpose of this scenario is to guide you through adding new appointment types and new subtypes.

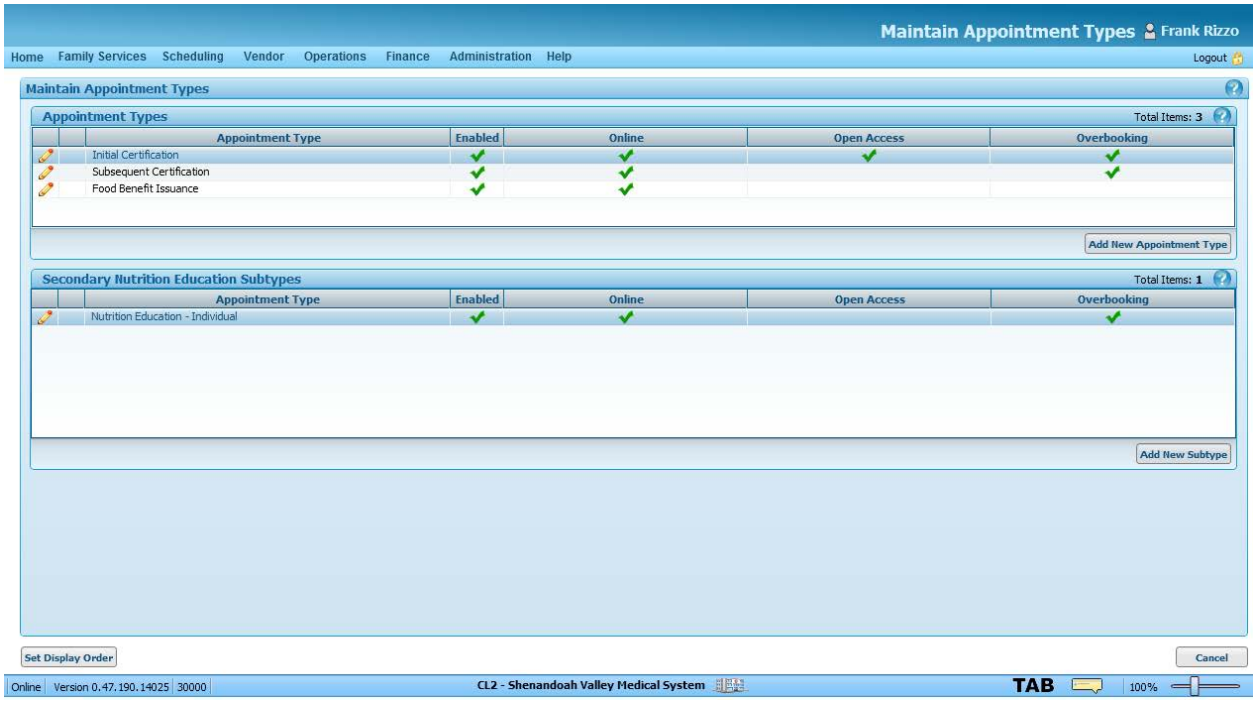
This process includes the following tasks:

Task A. Adding a New Appointment Type 15-2
Task B. Adding New Nutrition Education Subtype..... 15-5

Task A. Adding a New Appointment Type

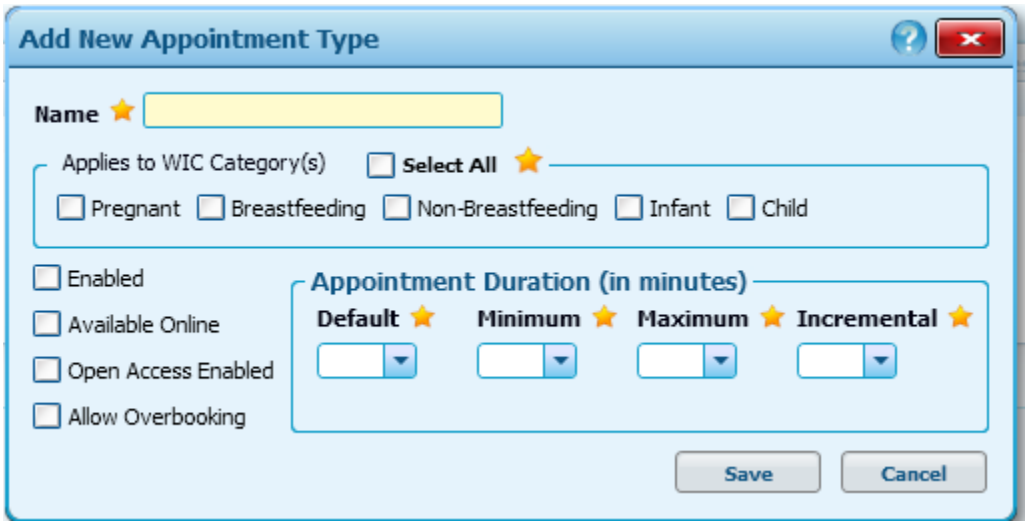
Complete the following steps to perform this task:

1. From the **Home** screen, go to the **Operations → Setup → Maintain Appointment Types**. The **Maintain Appointment Types** screen displays.

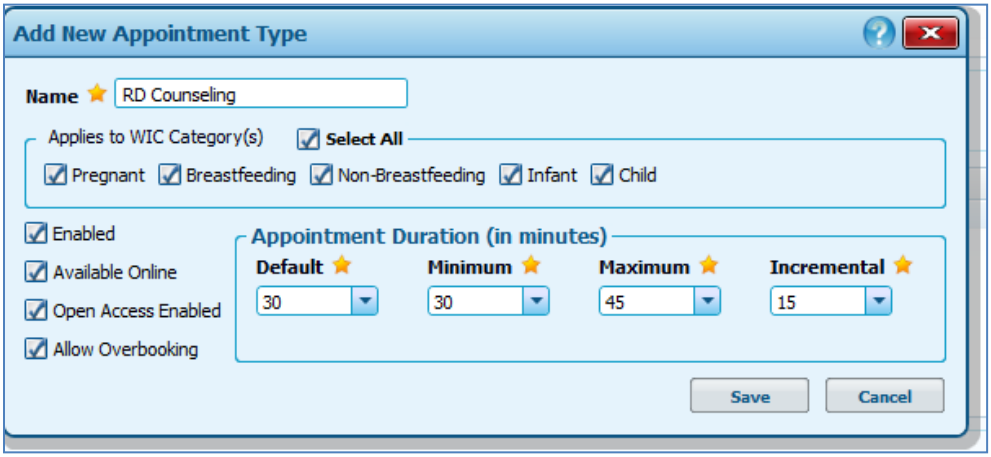


It is necessary to be logged in at the clinic level to add appointment types.

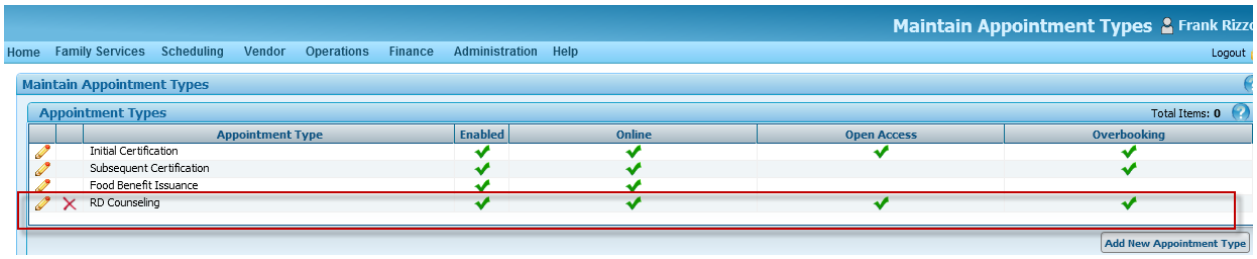
2. Click **Add New Appointment Type**. The **Add New Appointment Type** screen displays.
3. Under **Add New Appointment Type**, complete the following:
   - Enter the **Name**.
   - Check **Select All** or one or more boxes within **Applies to WIC Category(s**).



   - Check one or more boxes associated with:
     - **Enabled**
     - **Available Online**
     - **Open Access Enabled**
     - **Allow Overbooking**
4. Within the **Appointment Duration (in minutes)** box, complete the following:
   - Select **Default**.
   - Select **Minimum**.
   - Select **Maximum**.
   - Select **Incremental**.



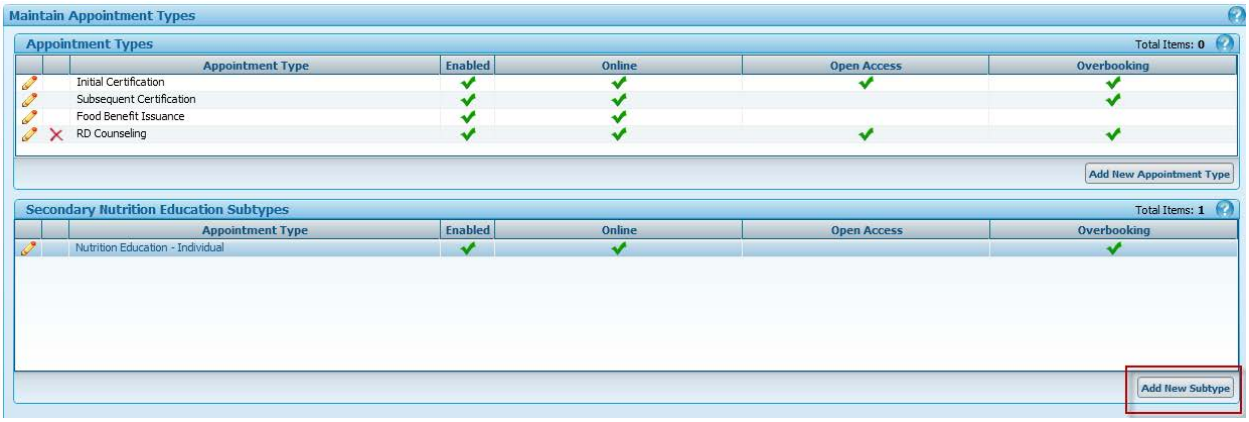
5. Click **Save**. The status message displays indicating RD Counseling-Appointment Type was saved successfully. The screen refreshes and the new appointment type displays on the **Appointment Types** grid.

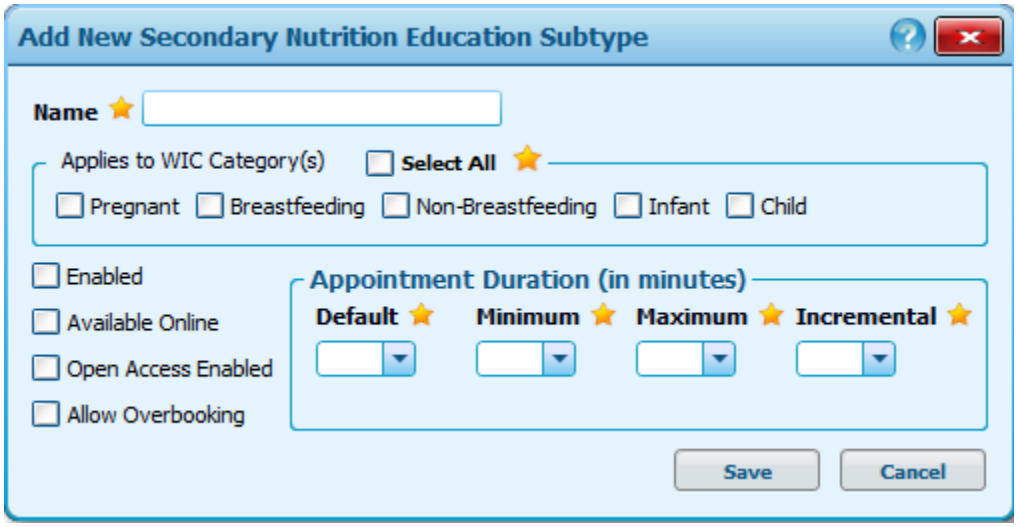


Task B. Adding New Nutrition Education Subtype

Complete the following steps to perform this task:

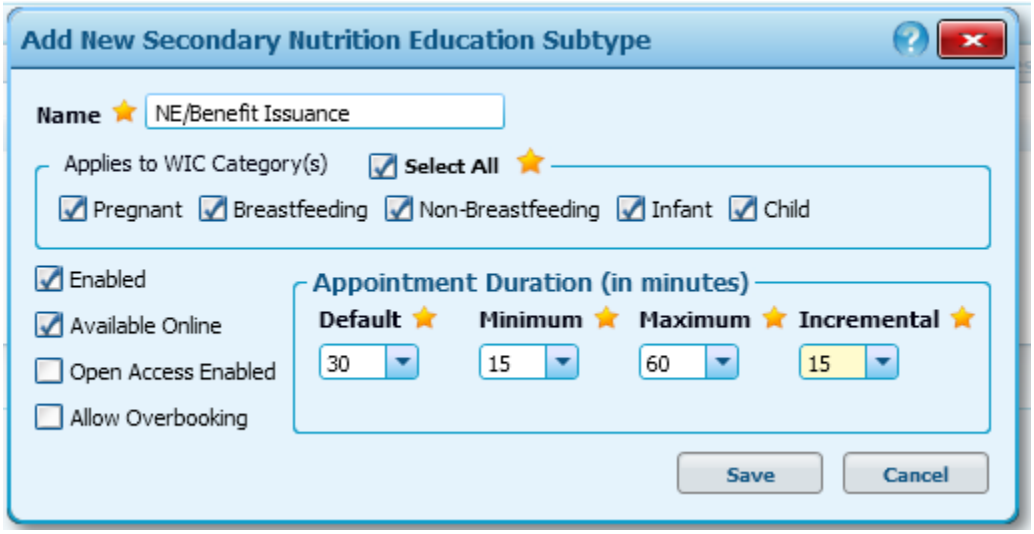
1. From the **Manage Appointment Types** screen, Click on **Add New Subtype**. The **Add New Secondary Nutrition Education Subtype** screen displays.





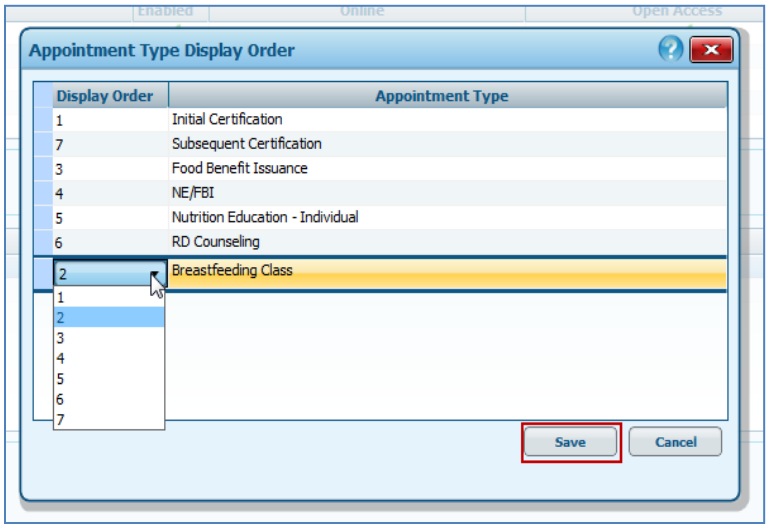
2. Within the **Add New Secondary Nutrition Education Subtype** box, complete the following:
   - Enter the **Name**.
   - Check **Select All** or one or more boxes within **Applies to WIC Category(s)**.
   - Click one or more boxes for:
     - **Enabled**
     - **Available Online**
     - **Open Access Enabled**
     - **Allow Overbooking**

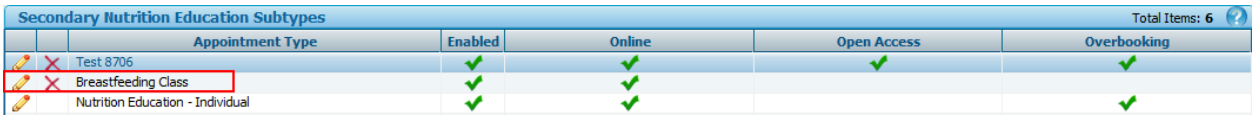
3. Under **Appointment Duration (in minutes)** complete the following:
   - Select **Default**.
   - Select **Minimum**.
   - Select **Maximum**.
   - Select **Incremental**.



4. Click **Save**. The status message displays indicating Breastfeeding Class – Nutrition Education Appointment Type was saved successfully. The screen refreshes and the new breastfeeding subtype displays on the **Secondary Nutrition Education Subtypes** grid.
5. Click on **Set Display Order** button. The **Appointment Type Display Order** screen displays.

6. Within the **Display Order** column, click on the display order number on a row.
7. Select a new **Display Order**.
8. Click **Save**. The screen refreshes and the **Breastfeeding Class** is now in second position.





Congratulations!

You have successfully completed the **Maintain Appointment Types** process.

Maintain Nutrition Education Topics

This scenario explains the process of maintaining nutrition education topics. The following scenarios will guide you through searching, adding, editing, and creating an online provider for nutrition education topics.

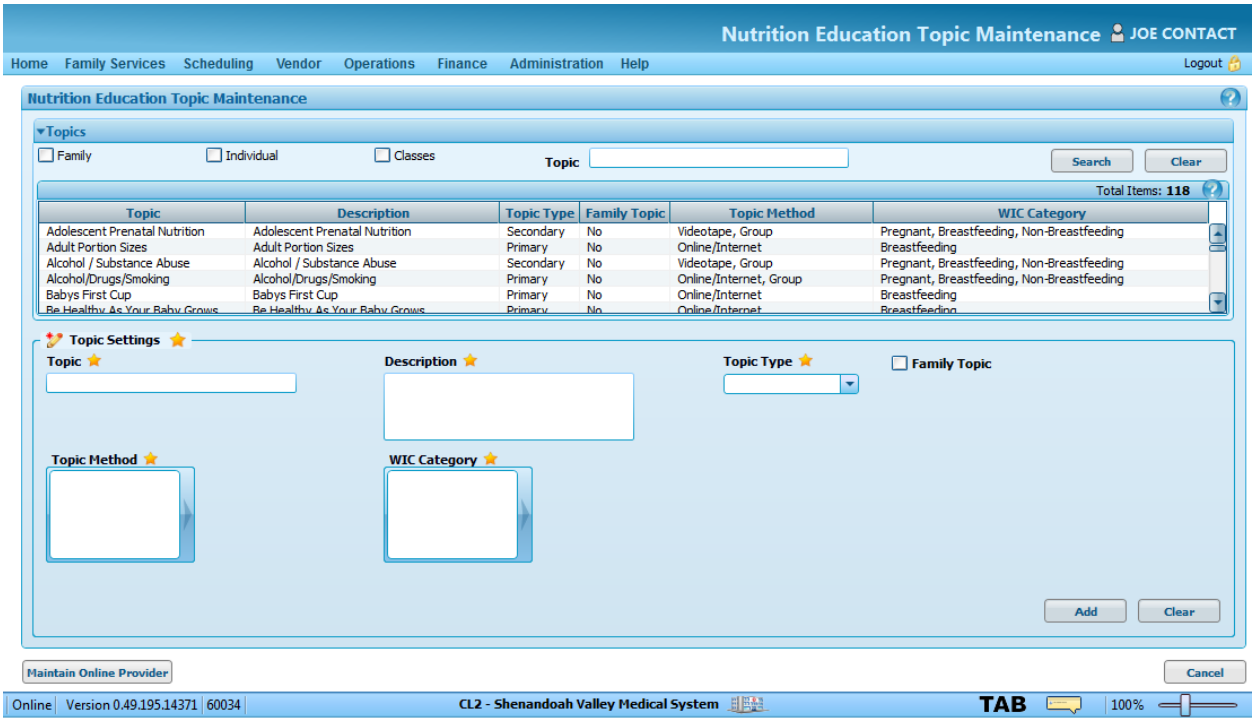
This process includes the following tasks:

Task A. Adding a Nutrition Education Topic 15-9
Task B. Searching and Editing a Nutrition Education Topic 15-11
Task C. Maintaining Online Providers..... 15-12

Task A. Adding a Nutrition Education Topic

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → Setup → Maintain Nutrition Education Topics**. The **Nutrition Education Topic Maintenance** screen displays.



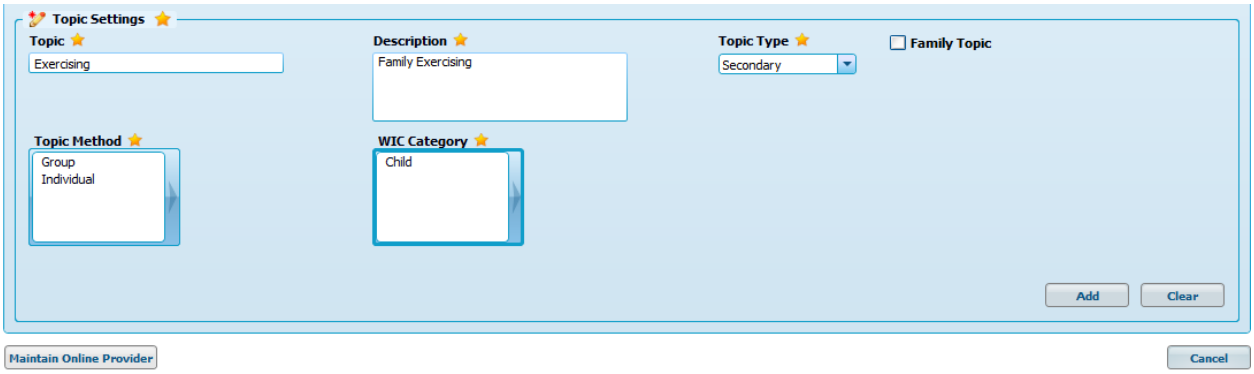
2. Under **Topics**, select or enter one or more of the following:
   - **Family**
   - **Individual**
   - **Classes**
   - Enter a **Topic**

If the Family Topic check box is selected, WIC Category is removed from the screen and an Online Provider group box displays.

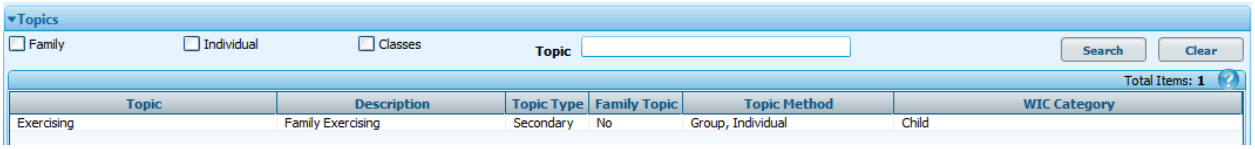
3. Click **Search**. A list of topics displays

If the topic you wish to add is included, then make the changes and click the Update button. If the topic is not listed, then continue with the following steps to create the topic.

4. Complete the fields under **Topic Settings**.
    - Enter the topic title under **Topic**.
    - Enter **Description**.
    - Enter **Topic Type**
    - Check if this **Is Family Topic**.
    - Select one or more topic methods from the **Topic Method** slider box.
    - Select one or more WIC categories from the **WIC Category** slider box.



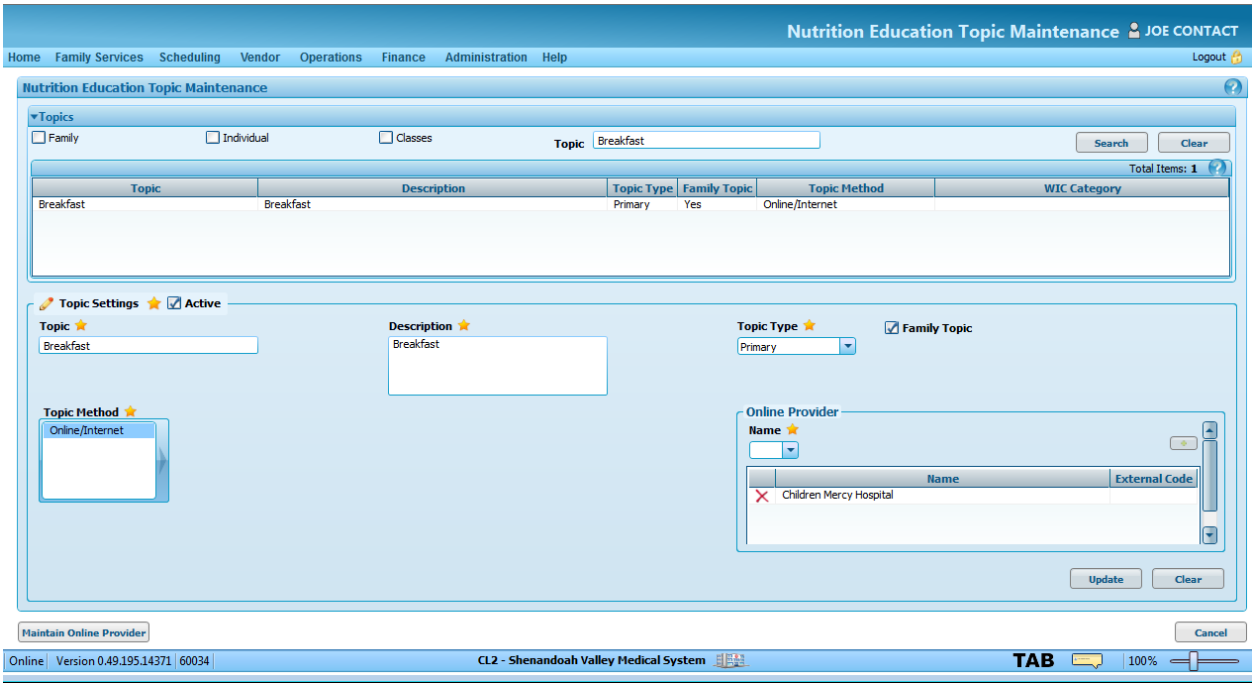
5. Click **Add**. The status message displays indicating the Nutrition Education Topic – Exercising was saved successfully. The screen refreshes and displays the new topic on the **Topics** grid.



Task B. Searching and Editing a Nutrition Education Topic

Complete the following steps to perform this task:

1. Under **Topics**, select one or more of the following:
   - **Family**
   - **Individual**
   - **Classes**
   - Enter **Topic**
2. Click **Search**. The screen refreshes and the nutrition education topic displays on the **Topics** grid.



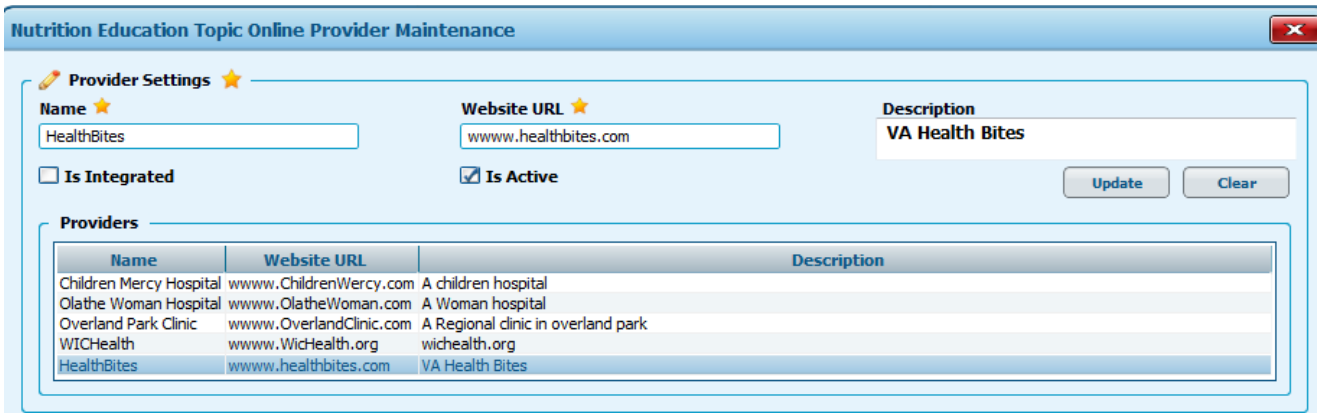
3. To edit a topic, highlight the topic on the grid and the details will appear under **Topic Settings**. Make changes as necessary.
4. Click **Update**. The status message displays indicating the nutritional education topic was saved successfully.

Task C. Maintaining Online Providers

Complete the following steps to perform this task:

1. Click on the **Maintain Online Provider** button. The **Nutrition Education Topic Online Provider Maintenance** screen displays.

2. Under **Provider Settings**, complete the following:
   - Enter the **Name**.
   - Enter the **Website URL**.
   - Enter a **Description**.
3. Click **Add**. The screen refreshes and the information displays on the **Providers** grid.



To update an existing provider select the row for the provider in the grid. Make the necessary changes in the fields and click the Update button.

Congratulations!

You have successfully completed the **Maintain Nutrition Education Topics** process.

Maintain Training Types

This scenario explains the process of adding, editing and maintaining training types.

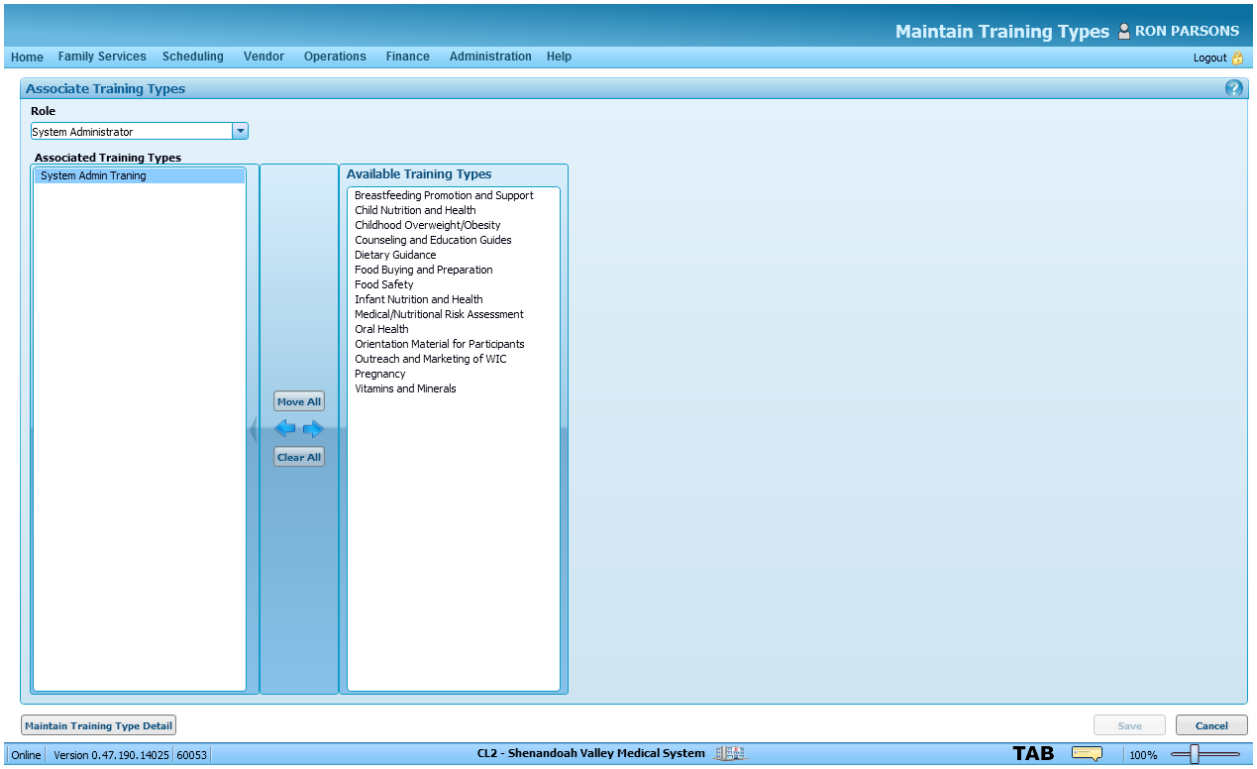
This process includes the following tasks:

Task A. Maintaining Training Types 15-14
Task B. Adding and Editing Training Types 15-18

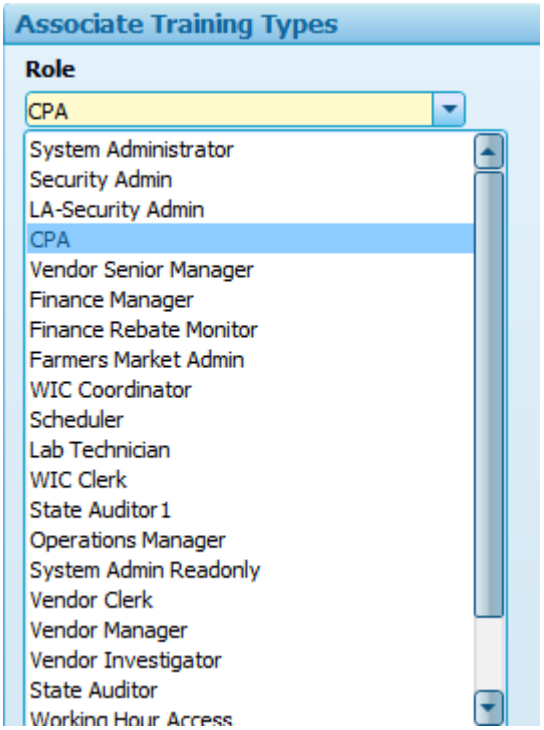
Task A. Maintaining Training Types

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → Setup → Maintain Training Types**. The **Maintain Training Types** screen displays.



2. Under **Associate Training Types**, select a **Role**.

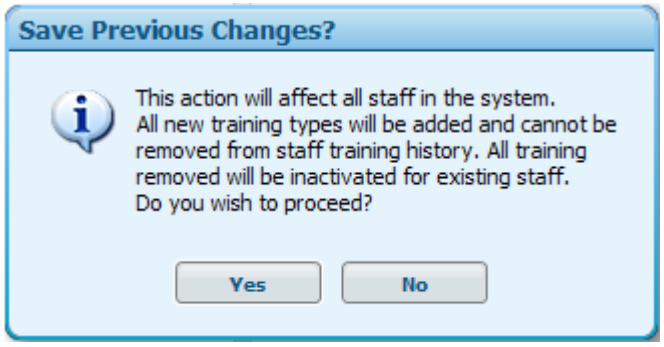


3. Under **Available Training Types**, select one or more training types.
4. Click the **Left Arrow** button ( ). The training type(s) selected displays under **Associated Training Types**.

Click Move All to select all available training types.

Click Clear All to unselect all available training types.

5. Click **Save**. A confirmation message displays.


Save Previous Changes?
This action will affect all staff in the system.
All new training types will be added and cannot be removed from staff training history. All training removed will be inactivated for existing staff.
Do you wish to proceed?
Yes
No

If Yes is clicked, all current and future staff assigned the selected role will be required to complete the selected training type(s).

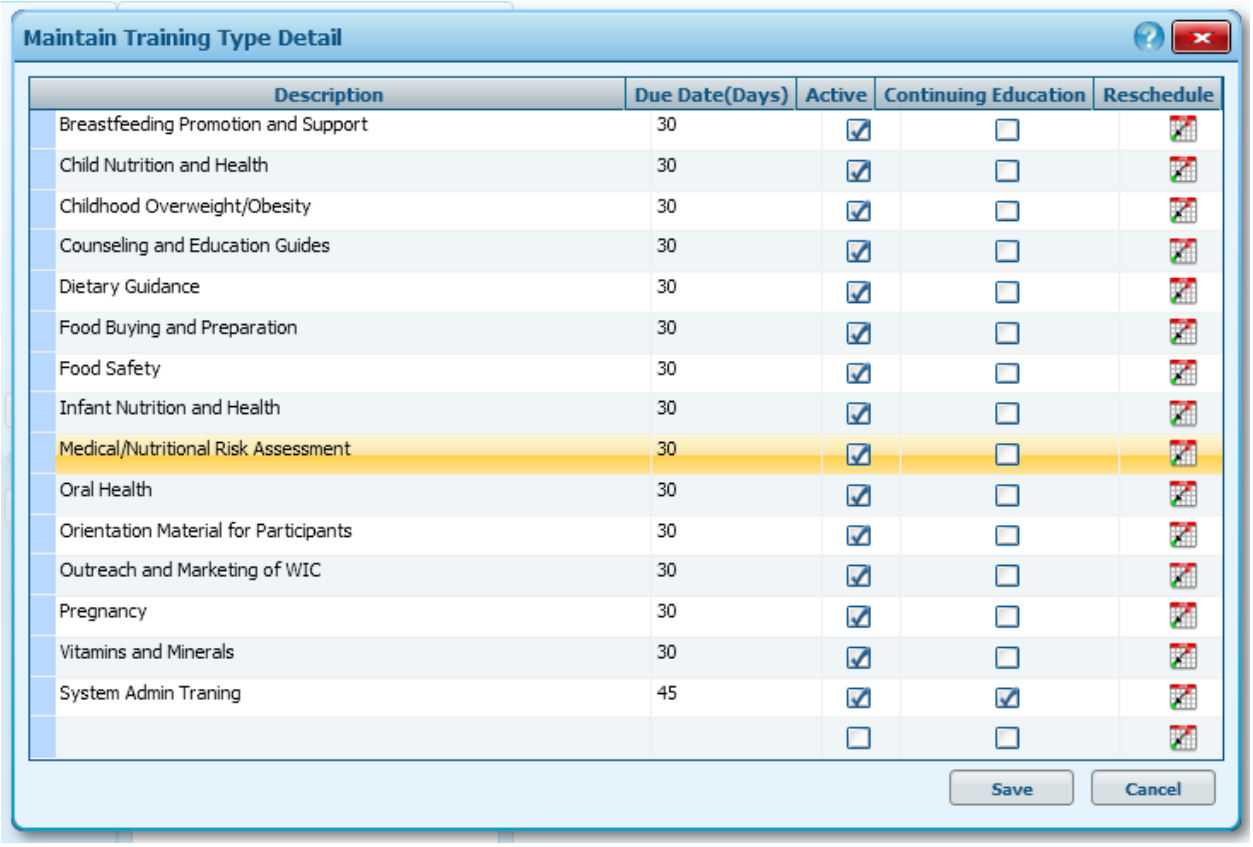
Click No to cancel the process and to make changes as necessary.

6. Select **Yes** to complete the process of associating training type(s) to the selected role. A status message displays indicating success.

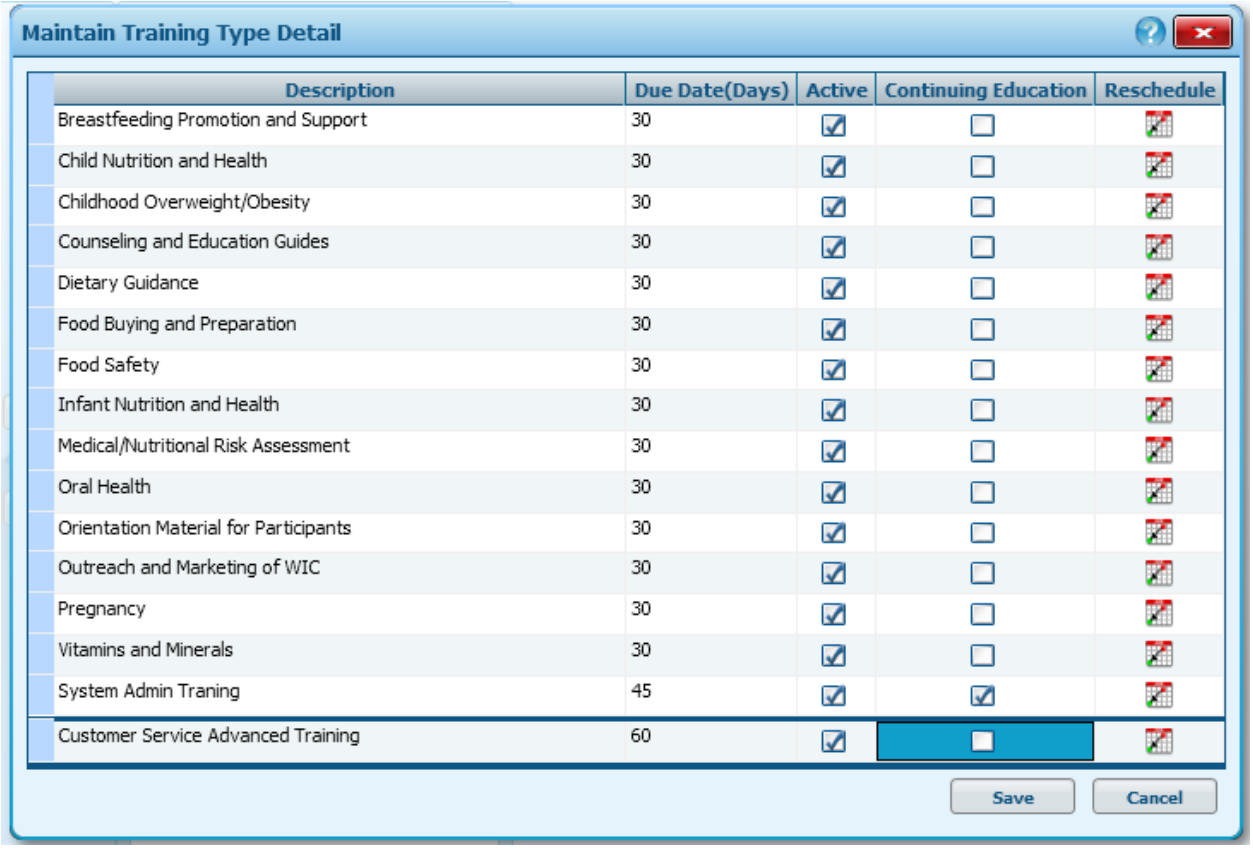
Task B. Adding and Editing Training Types

Complete the following steps to perform this task:

1. From the **Maintain Training Types** screen, click **Maintain Training Type Detail**. The **Maintain Training Type Detail** screen displays.



2. To edit a training type, select or unselect the **Active** and/or **Continuing Education** check boxes for each row, as necessary.
3. To add a training type, place your cursor within the last row of the grid, then enter a **Description** for the new training type.



- Select the **Active** check box to make the training type active, if necessary.
- Select the **Continuing Education** check box to indicate the training type qualifies for continuing education credits, if necessary.

4. Click **Save**. A status message displays and you are returned to the **Maintain Training Types** screen.

Congratulations!

You have successfully completed the **Maintain Training Types** process.

Maintain Assets

The **Asset Maintenance** screen provides the user with the ability to define and maintain assets that will be used in scheduling various events in various calendars. Assets can be created at all locations and levels (including state, local agency, and/or clinic) based upon the location the user is currently signed in. Assets can be associated to nutrition education classes during the process of building a **Clinic Master Calendar**.

This process includes the following tasks:

Task A. Adding Assets 15-21

Task B. Editing Assets 15-23

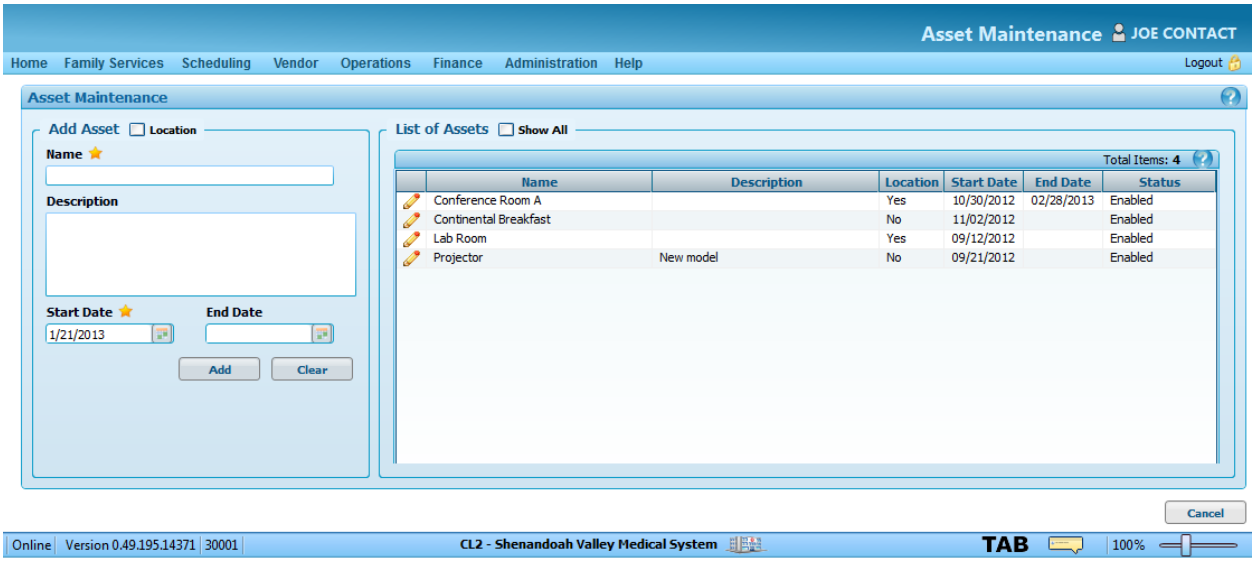
Task C. Disable Assets 15-25

Task D. Enable Previously Disabled Assets 15-26

Task A. Adding Assets

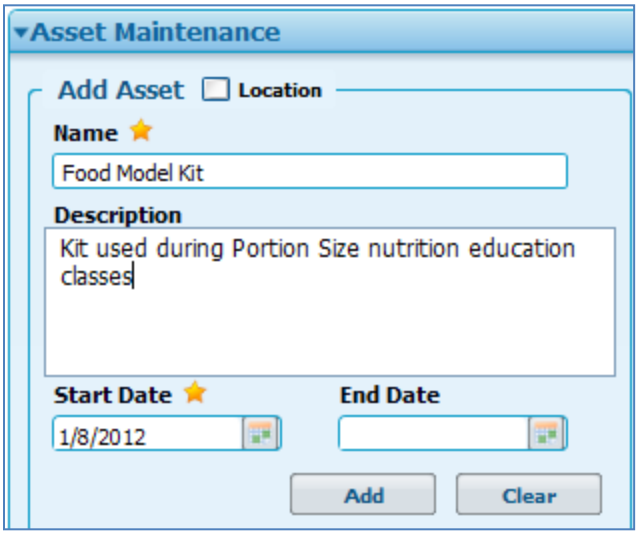
Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → Setup → Maintain Assets**. The **Asset Maintenance** screen displays.

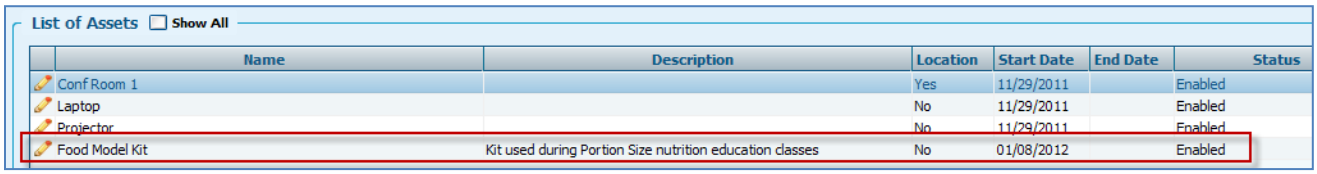


The List of Assets grid displays a list of all active assets. Click Show All to display both Enabled (active) and Disabled (inactive) assets within the grid.

2. Under **Add Asset**, check **Location** if the asset is to be a location (place).
3. Enter a **Name**.
4. Enter a **Description**.
5. Modify the **Start Date**, if necessary.
6. Enter or select an **End Date**, if necessary.



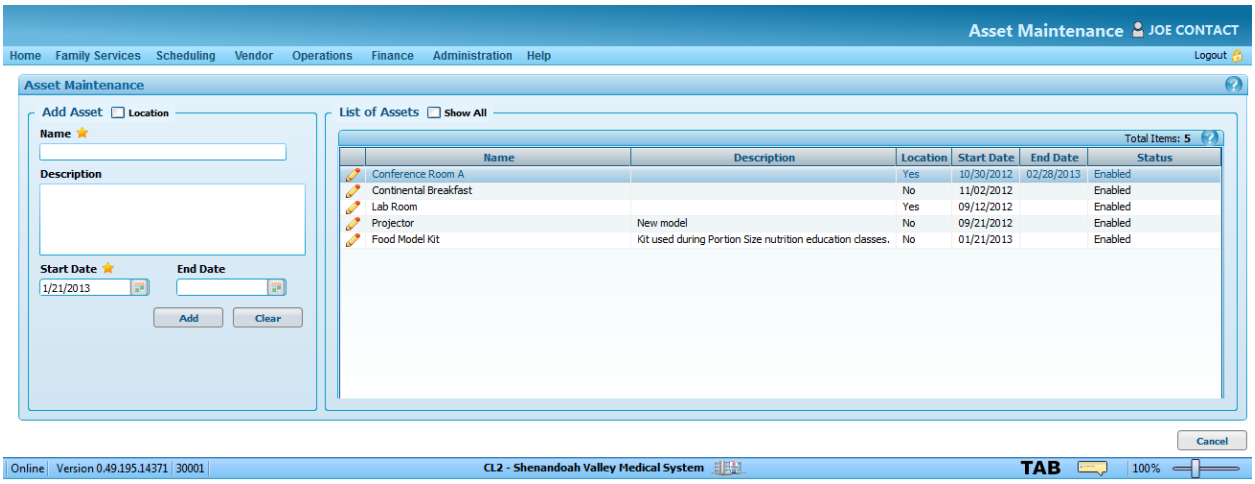
7. Click **Add**. A status message displays indicating success and the newly added asset is added to the **List of Assets** grid.



Task B. Editing Assets

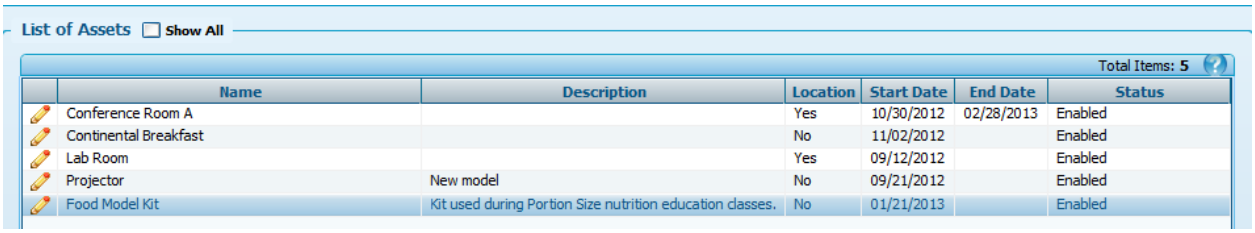
Complete the following steps to perform this task:

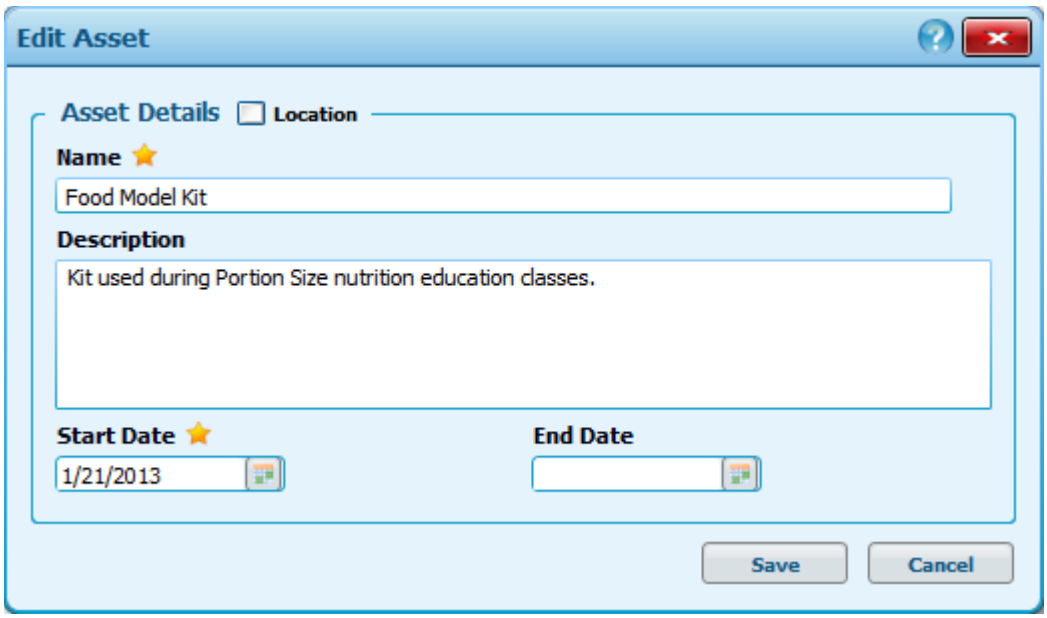
1. From the **Home** screen, go to **Operations → Setup → Maintain Assets**. The **Asset Maintenance** screen displays.



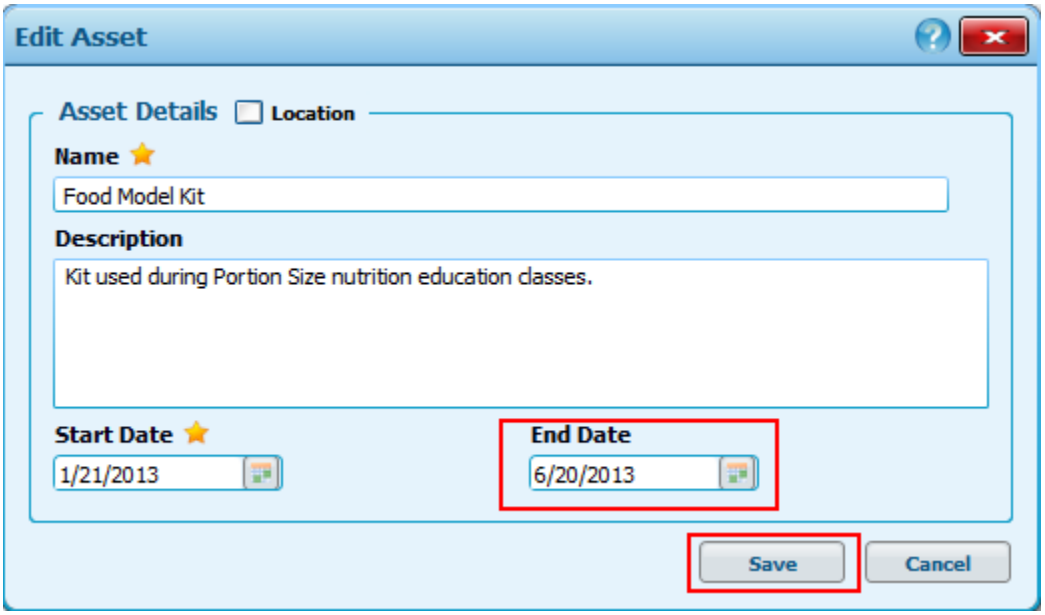
The List of Assets grid displays a list of all enabled (active) assets. Click Show All to display both Active and Inactive assets within the grid.

2. Click the **Edit** button ( ). The **Edit Asset** screen displays.

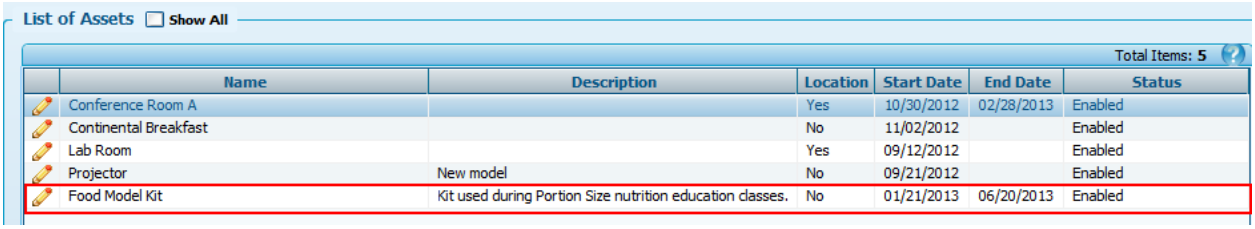




3. Edit the selected asset information, as necessary.



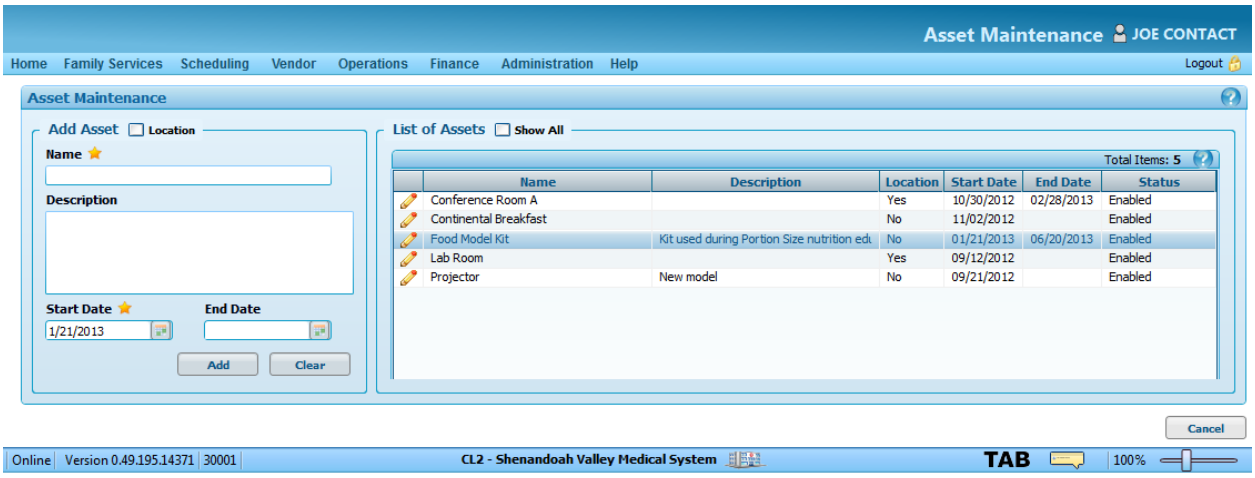
4. Click **Save**. A status message displays indicating success. You are returned to the **Asset Maintenance** screen and the grid is updated to display the changes.



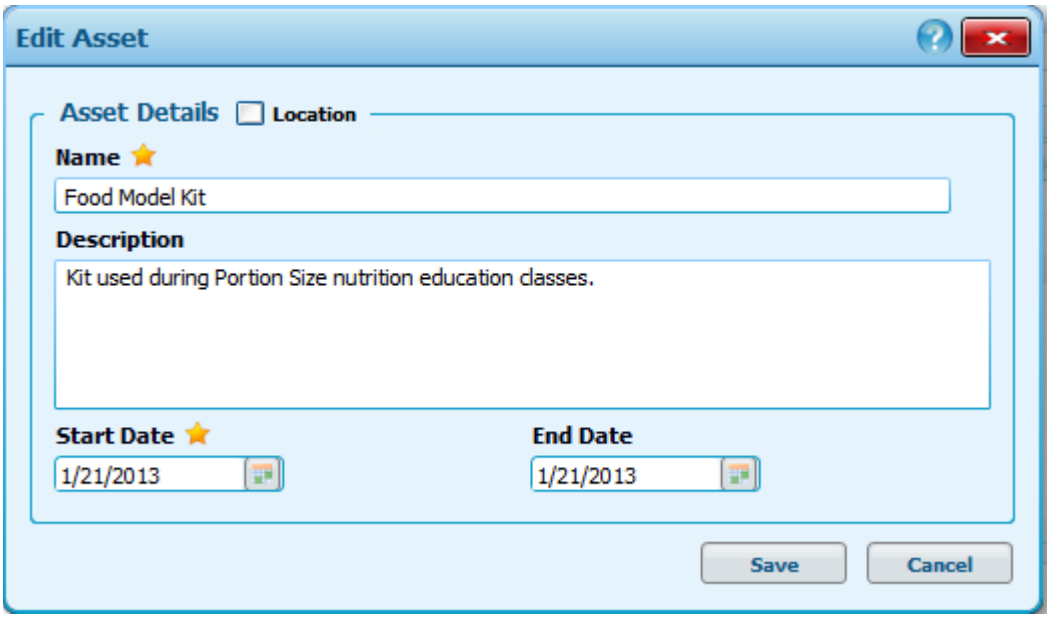
Task C. Disable Assets

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → Setup → Maintain Assets**. The **Asset Maintenance** screen displays.



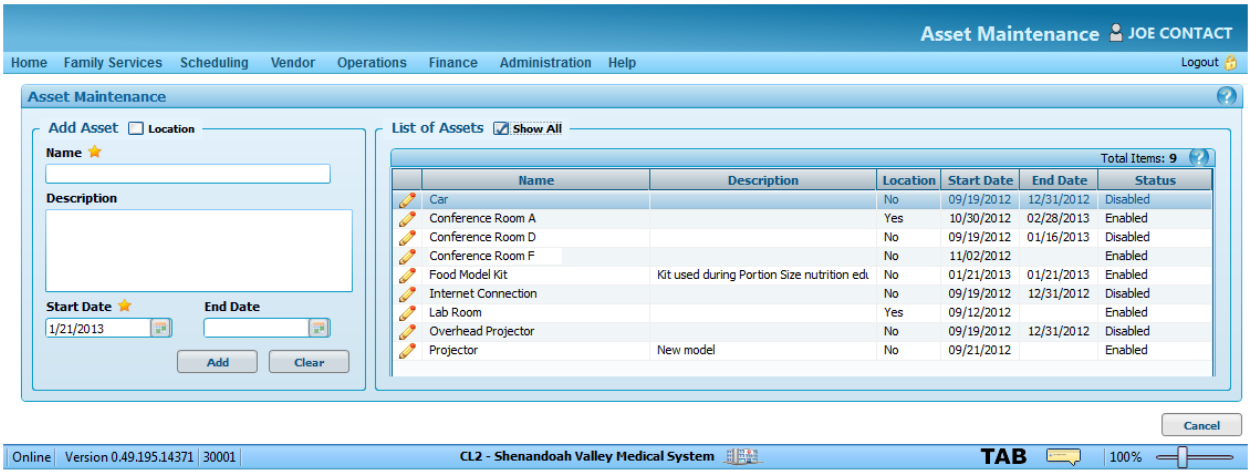
2. Click the **Edit** button ( ). The **Edit Asset** screen displays.
3. To disable as asset set the **End Date** to the last day you want the asset to be enabled and click **Save**. The asset will be disabled the following day.



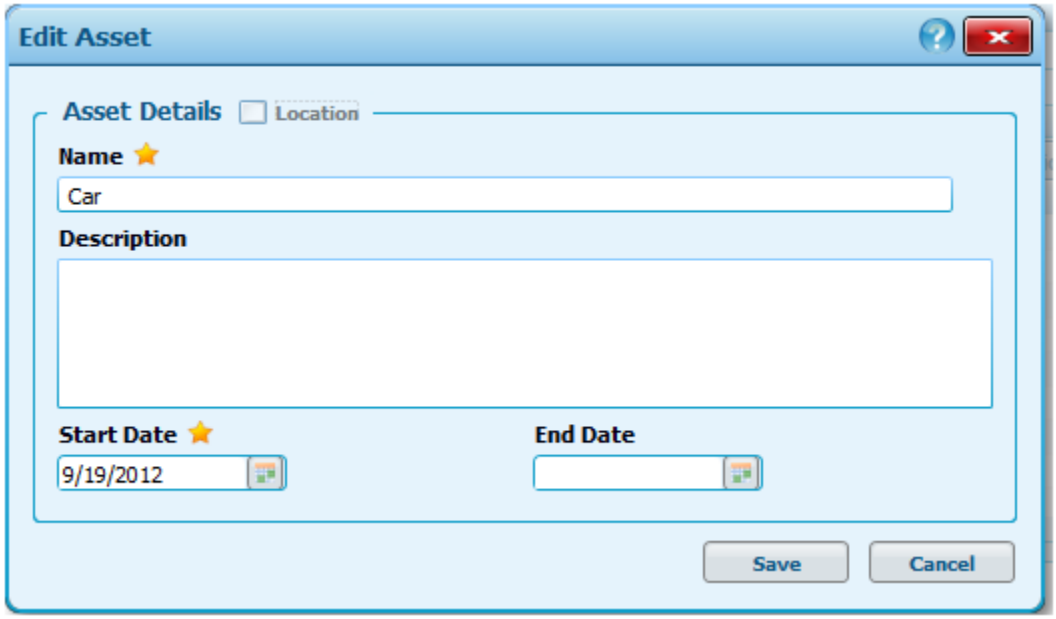
Task D. Enable Previously Disabled Assets

Complete the following steps to perform this task:

1. To enable as asset previously enabled, first click **Show All** on the **List of Assets** grid. The disabled assets will then be shown.



2. Click the **Edit** button ( ) for the asset you want to enable.
3. Delete the **End Date** or set it to a future date and click **Save** to enable the asset.



Congratulations!

You have successfully completed the **Maintain Assets** process.

Maintain Referral Organizations

The **Maintain Referral Organization** screen provides the user with the ability create and maintain a list of external organizations for WIC participants to use when being referred for additional assistance or services. Details of the organization are defined here, including contact information, address and hours of operations.

Referral organizations created on this screen are leveraged on the **Referral Program** screen in the clinic module. For more information about referral programs, refer to the Family Services User Manual or the Clinic Module DFDD.

This is a state-wide maintenance screen. Referral organizations created on this screen are available for users at all locations.

This process includes the following tasks:

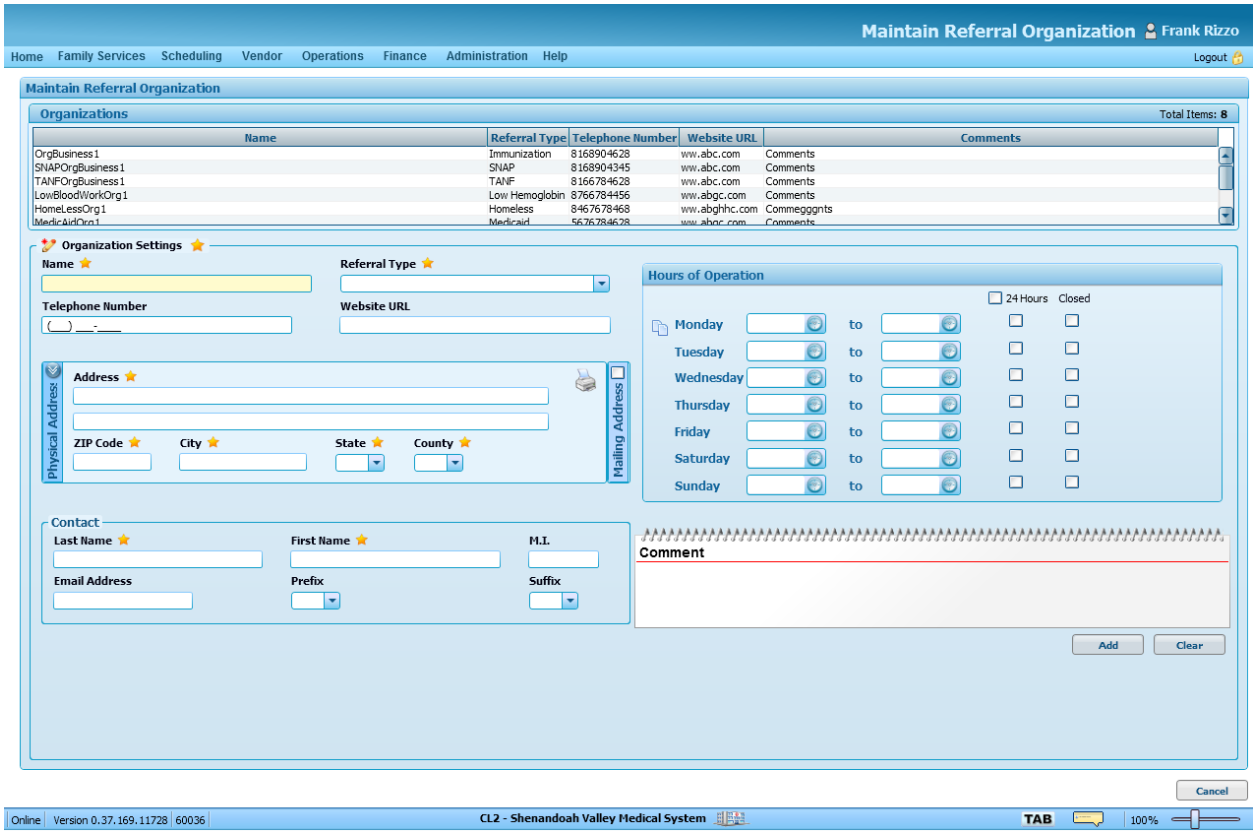
Task A. Create New Referral Organizations..... 15-28

Task B. Modify Existing Organizations..... 15-31

Task A. Create New Referral Organizations

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → Setup →Maintain Referral Organizations**. The **Maintain Referral Organization** screen displays.



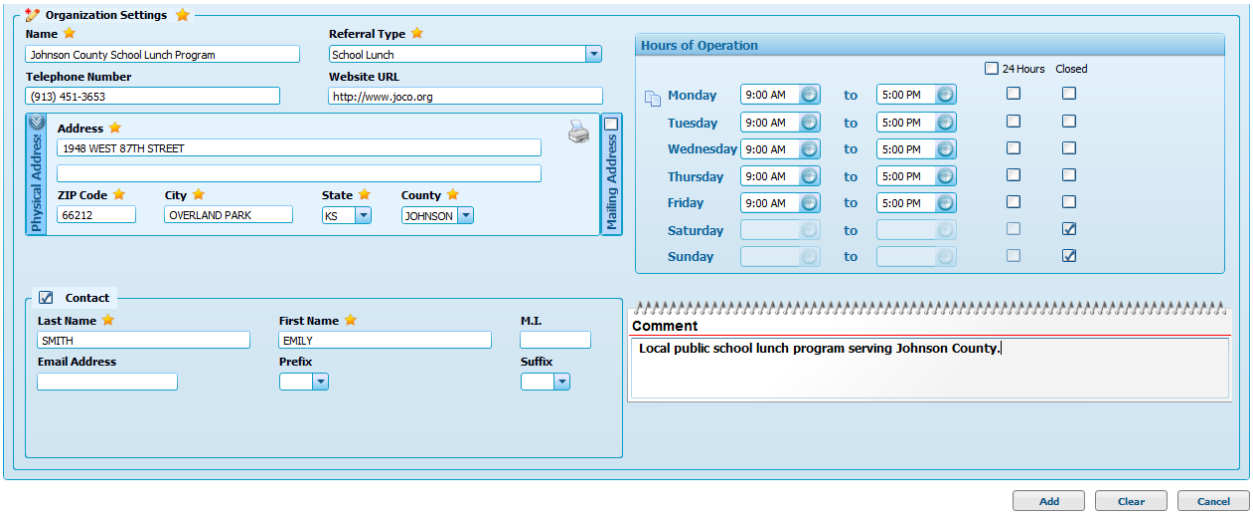
2. To create a new referral organization complete the following fields in the **Organizational Settings** input box:
   - Enter the **Name** of the organization (required).
   - Select the **Referral Type** from the drop down values (required).
   - Enter the **Telephone Number**.
   - Enter the organization's **Website URL**.

Maintain Referral Types in Edit Reference tables as lkReferralType.

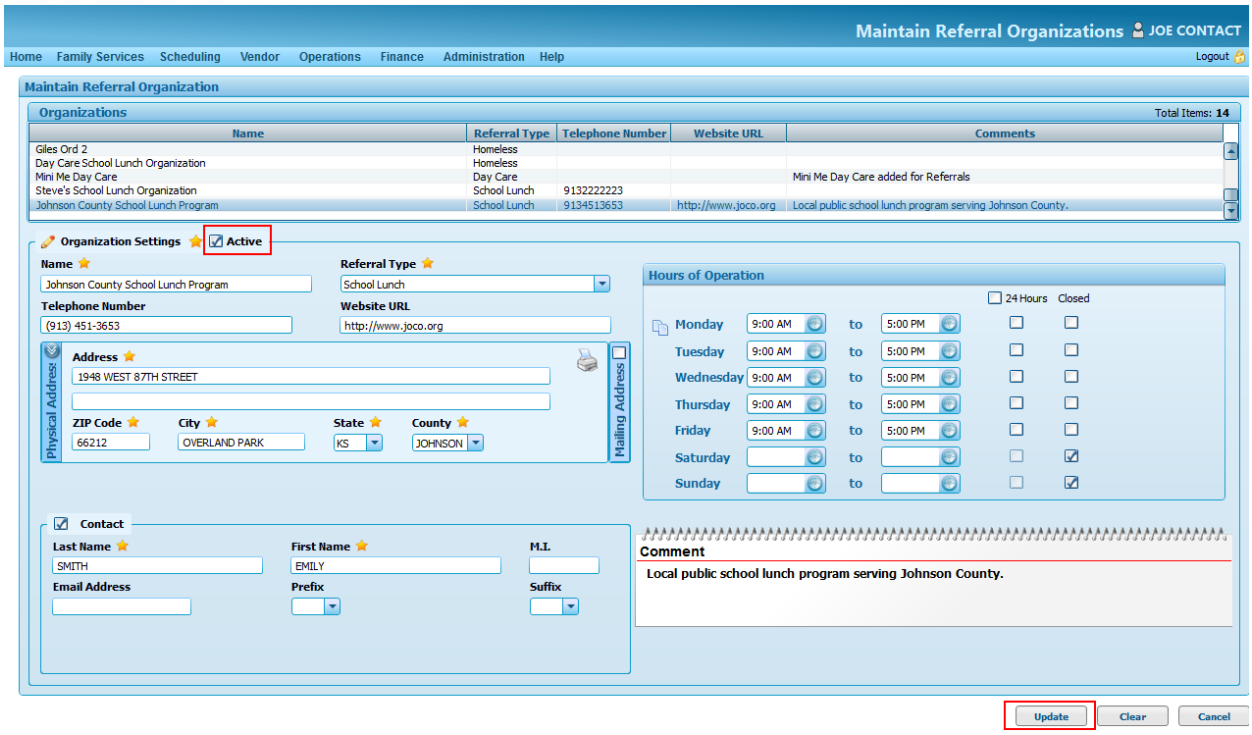
3. Complete **Address** fields.
4. Complete **Contact** information.
5. Enter the **Hours of Operation** of the organization for each day by entering the beginning time and ending time or select that it is open 24 hours that day or closed.

Clicking on the box at the top next to the 24 hours indicates the organization is open 24 hours every day.

6. Enter **Comments** about the organization in the comment box.



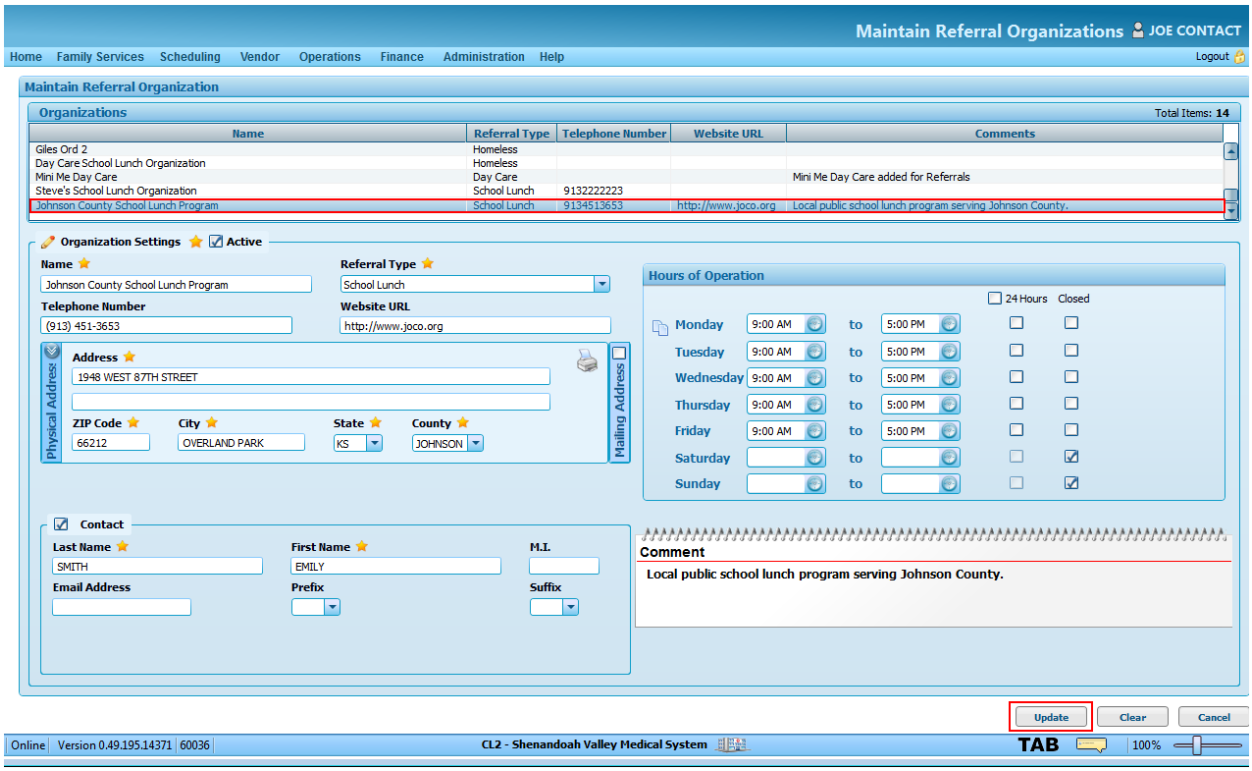
7. Click **Add**. A status message displays indicating success and the newly added organization is added to the **Organizations** grid.
8. Click the **Active** box to have the organization remain active or uncheck the box to remove the organization from the referral list.



Task B. Modify Existing Organizations

Complete the following steps to perform this task:

1. On the **Maintain Referral Organizations** screen in the **Organization** grid select the organization you want to modify.



2. Make the modifications necessary and click **Update**. A status message indicates the update was successful.

Congratulations!

You have successfully completed the **Maintain Referral Organizations** process.

Maintain Local Agencies

The purpose of this scenario is to guide you through capturing information on local agencies and allow for the addition, modification or deletion of data related to local agency operations. The **Maintain Local Agency** screens will be used to search and edit an existing agency, record or create a new local agency record. Before beginning the process you must be signed into Crossroads at the state level.

This process includes the following tasks:

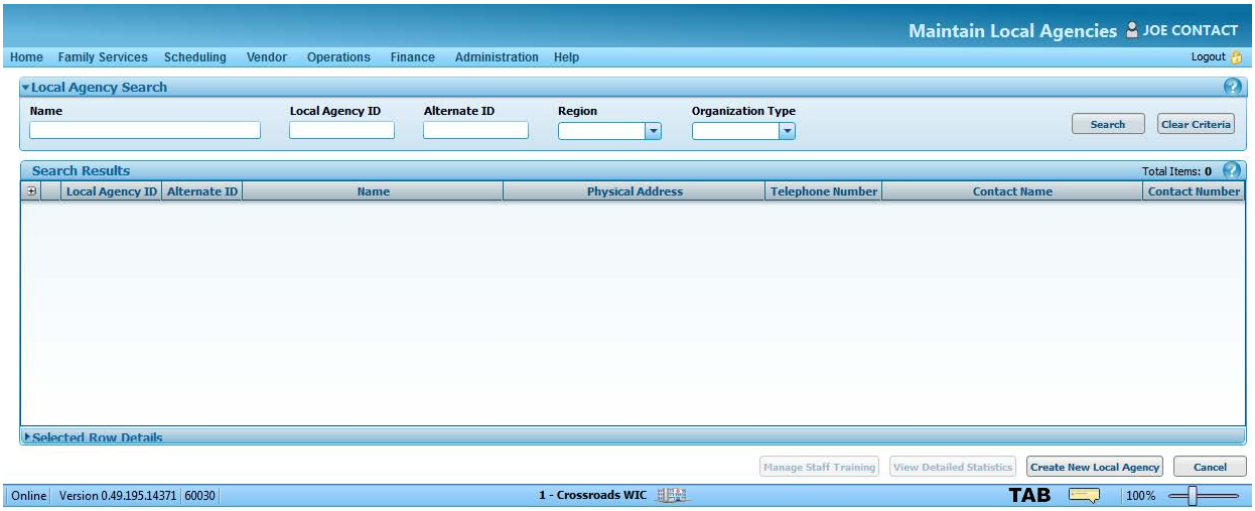
Task A. Creating a Local Agency 15-33

Task B. Searching and Editing an Existing Local Agency..... 15-38

Task A. Creating a Local Agency

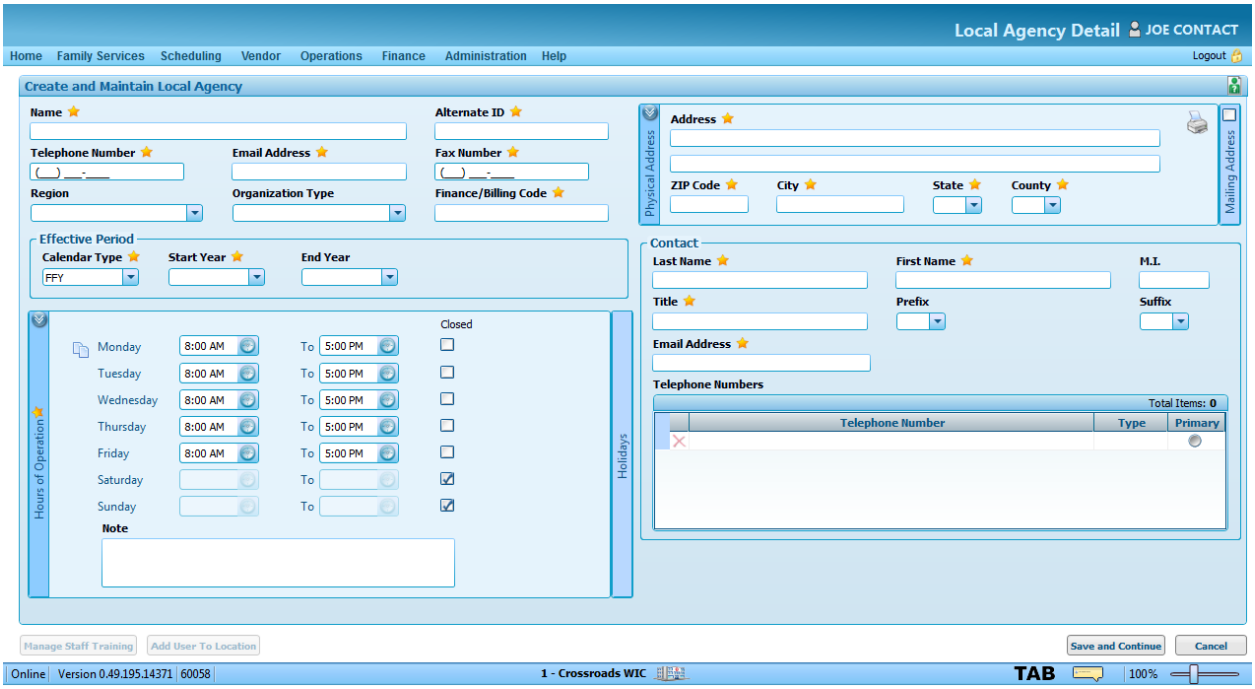
Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → Setup → Maintain Local Agencies**. The **Maintain Local Agencies** screen displays.

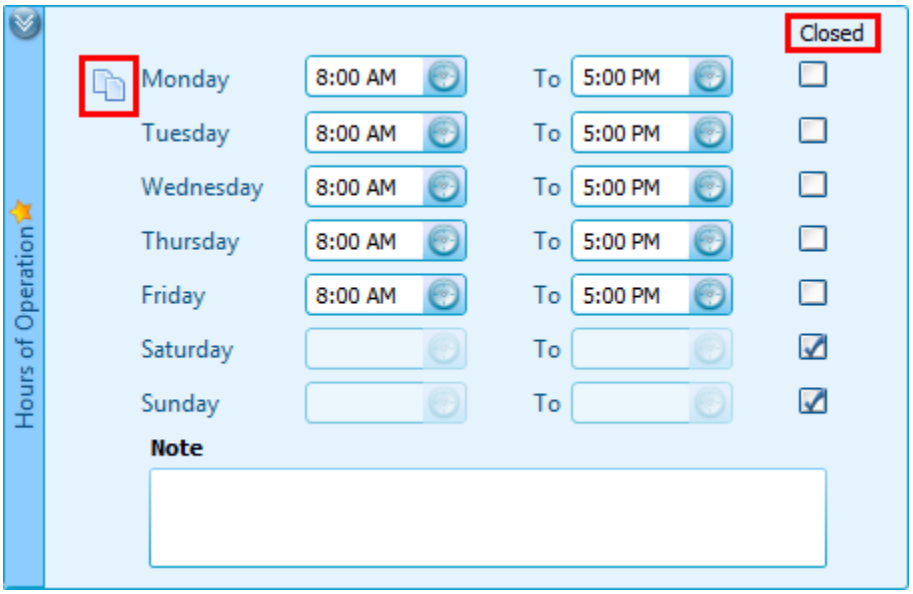


It is necessary to be logged in at the state level.

2. Click **Create New Local Agency**. The **Local Agency Detail** screen displays.

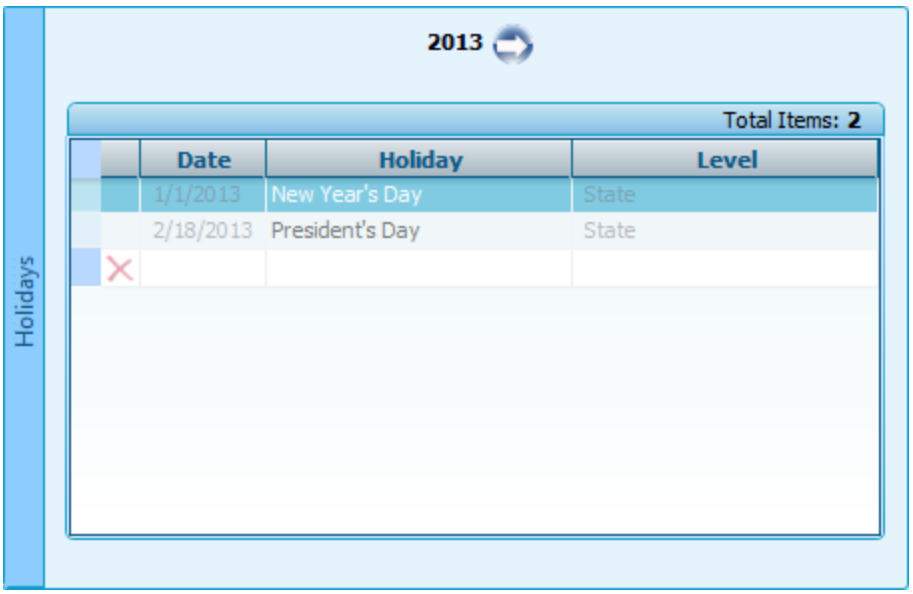


3. Under **Create and Maintain Local Agency**, complete the following:
    - Enter the local agency **Name**.
    - Enter an **Alternate ID**.
    - Enter the **Telephone Number**.
    - Enter the **Email Address**.
    - Enter the **Fax Number**.
    - Select the **Region** (optional).
    - Select the **Organization Type** (optional).
    - Enter the **Finance/Billing Code**.
4. Under **Effective Period**, complete the following:
    - Enter or select the **Calendar Type**.
    - Enter or select the **Start Year**.
    - Enter or select the **End Year** (optional).
5. Within the **Hours of Operation** box complete the following:
    - Enter the opening time and the closing time for each day of the week that the agency will be in operation.
    - Click on the icon framed in red if the operation times for the remainder of the week will be the same as Monday.
    - Click the box under **Closed** when the agency will be closed.

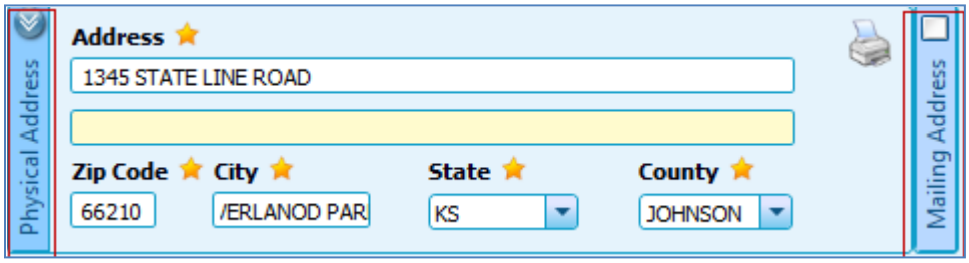


- Click on the **Holidays** slider bar to see the holiday schedule for the current year.

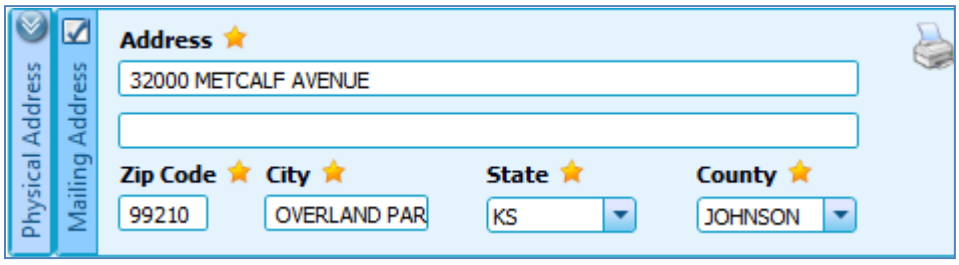
See Configuration Settings to setup local agency holidays.



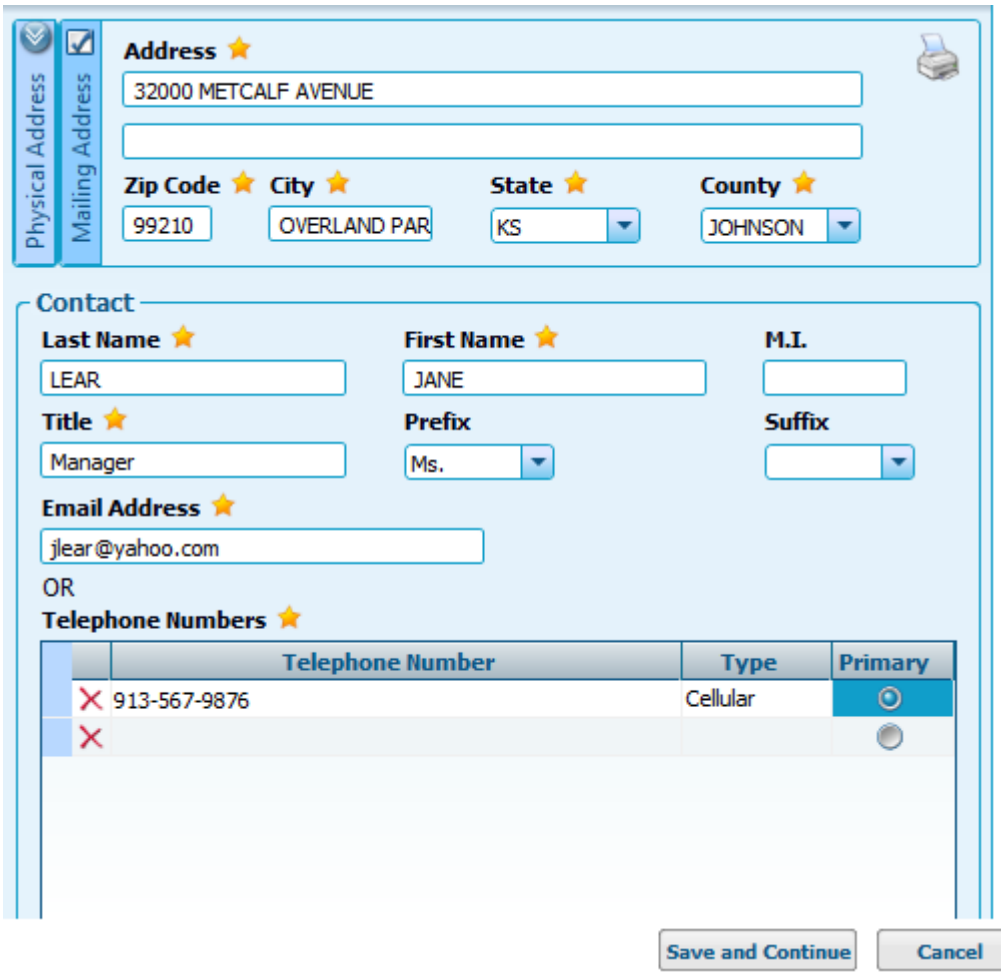
- Enter the **Physical Address**.

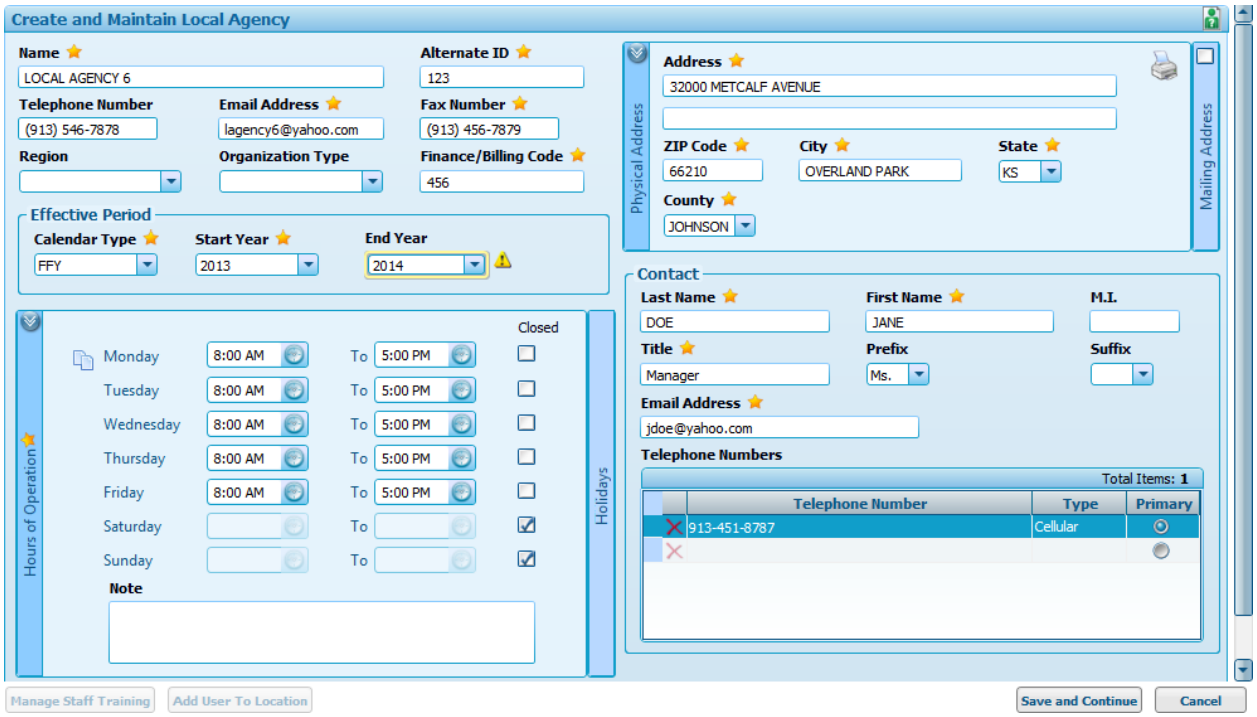


- Click on the **Mailing Address** slider bar, if the mailing address differs from the physical address.



6. Under **Contact** complete the following:
   - Enter the **Last Name**.
   - Enter the **First Name**.
   - Enter the **Title**.
   - Select the **Prefix** (optional).
   - Select the **Suffix** (optional).
   - Enter the **Email Address** (optional if telephone number is entered).
   - Enter **Telephone Numbers** (optional if email address is entered).



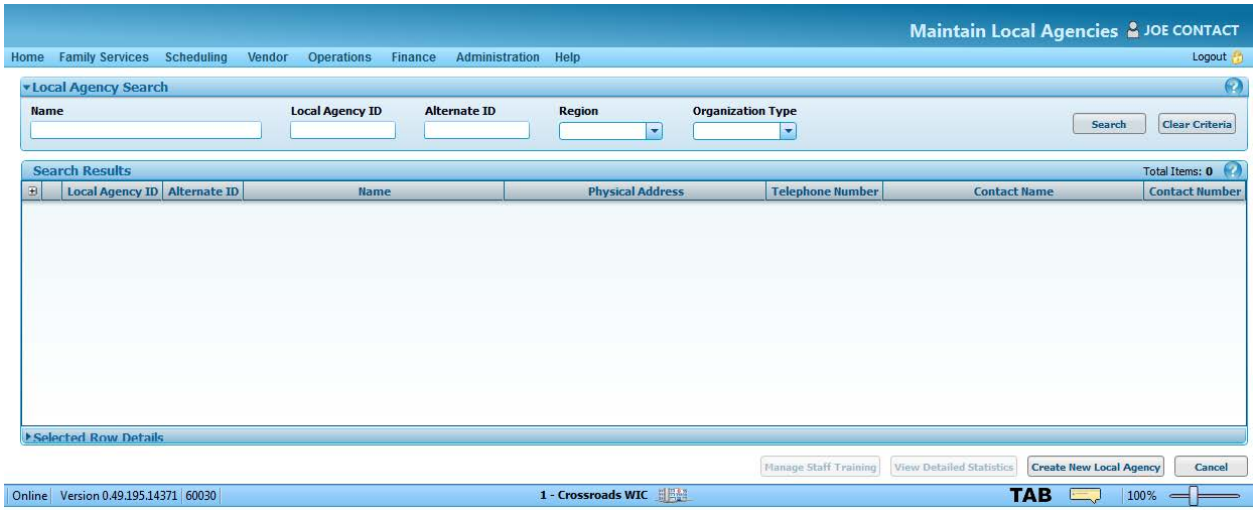


7. Click **Save and Continue**. The status message displays indicating new local agency information was saved successfully. The screen refreshes and returns to the **Maintain Local Agencies** screen.

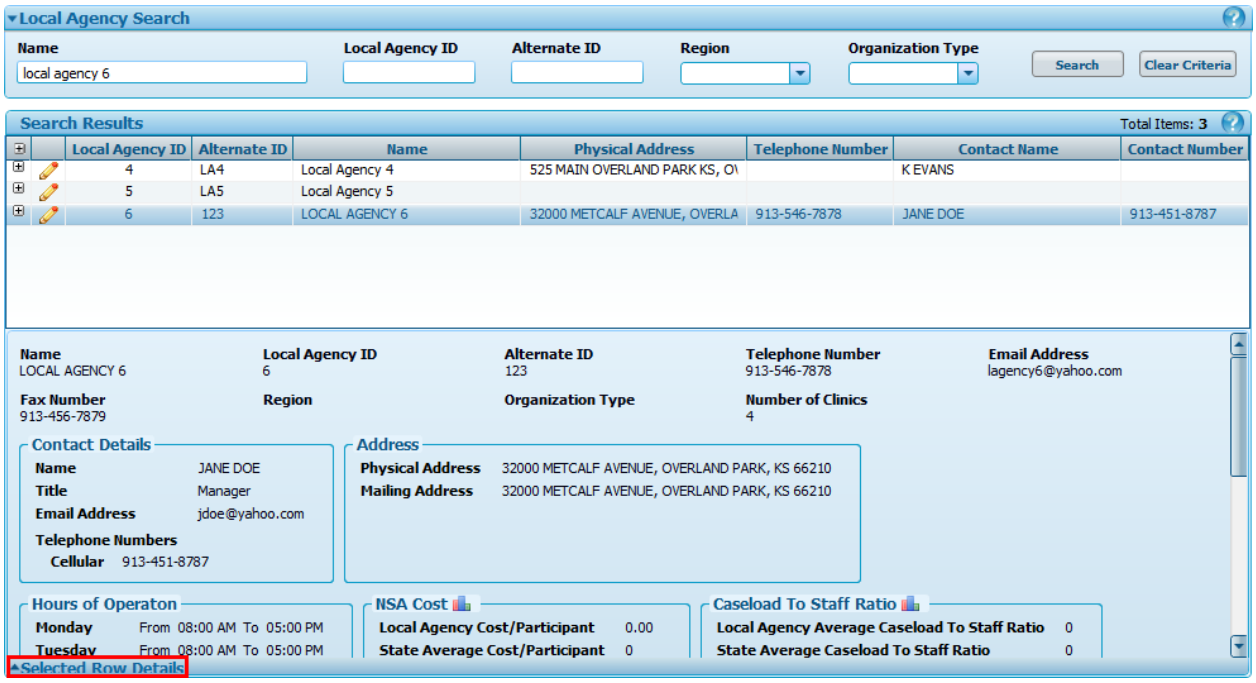
Task B. Searching and Editing an Existing Local Agency

Complete the following steps to perform this task:

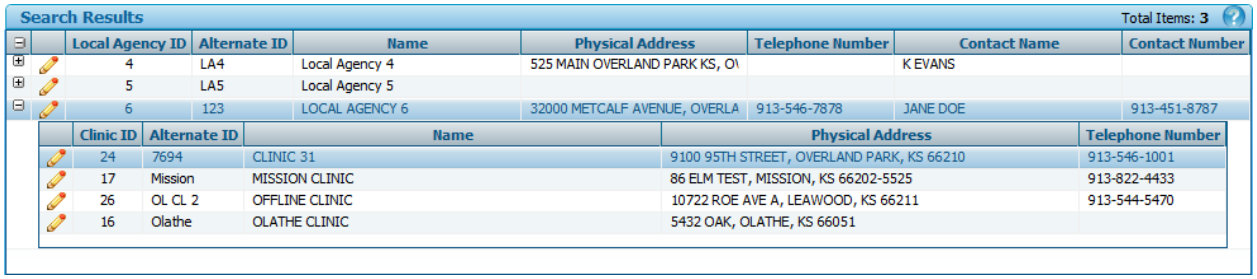
1. From the **Home** screen, go to the **Operations → Setup → Maintain Local Agencies**. The **Maintain Local Agencies** screen displays.



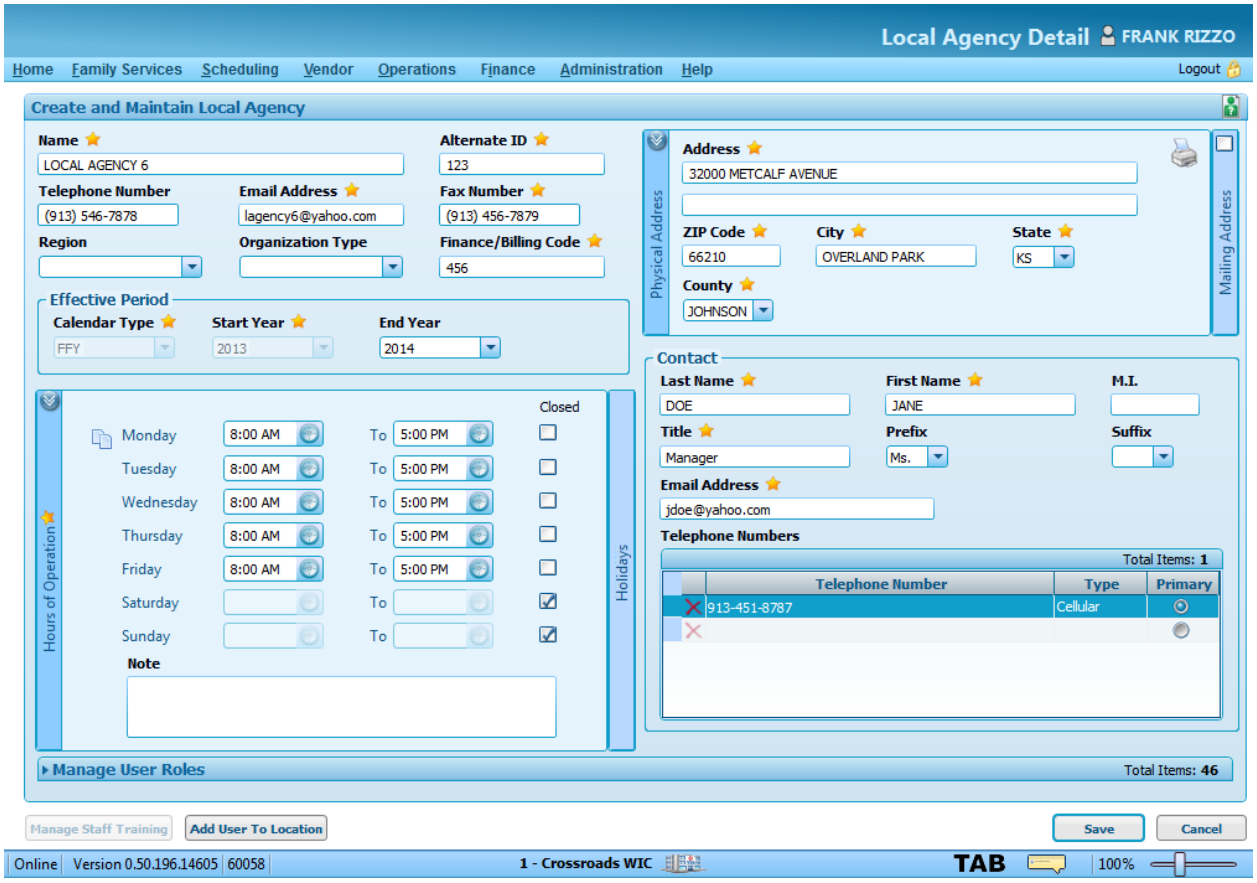
2. Under **Local Agency Search**, enter one of the displayed search criteria options.
3. Click **Search**. The screen refreshes and the search results display on the grid.
4. Select the agency and click the **Selected Row Details** arrow. Displayed are all the details entered when the agency was created.



5. Click the plus sign (⊞) on the local agency row. The clinic(s) affiliated with the local agency display.


Search Results
Total Items: 3
Local Agency ID | Alternate ID | Name | Physical Address | Telephone Number | Contact Name | Contact Number
4 | LA4 | Local Agency 4 | 525 MAIN OVERLAND PARK KS, O\ | | K EVANS |
5 | LA5 | Local Agency 5 | | | |
6 | 123 | LOCAL AGENCY 6 | 32000 METCALF AVENUE, OVERLA | 913-546-7878 | JANE DOE | 913-451-8787
Clinic ID | Alternate ID | Name | Physical Address | Telephone Number
24 | 7694 | CLINIC 31 | 9100 95TH STREET, OVERLAND PARK, KS 66210 | 913-546-1001
17 | Mission | MISSION CLINIC | 86 ELM TEST, MISSION, KS 66202-5525 | 913-822-4433
26 | OL CL 2 | OFFLINE CLINIC | 10722 ROE AVE A, LEAWOOD, KS 66211 | 913-544-5470
16 | Olathe | OLATHE CLINIC | 5432 OAK, OLATHE, KS 66051

6. Click the **Edit** button ( ). You are directed to the **Local Agency Detail** screen. Make the necessary changes.



7. Click **Save**. The status message displays indicating new local agency information was saved successfully. The screen refreshes and returns to the **Maintain Local Agencies** screen.

You may need to click on the Selected Row Details arrow to view your changes. Since an additional phone number was added and marked as primary, it displays on the grid.

Congratulations!

You have successfully completed the **Maintain Local Agencies** process.

Maintain Clinics

This scenario allows for the capture of information on clinics and the addition, modification or deletion of data related to clinic operations. Clinics will have immediate access to data that allows them to do high level comparative analysis between their clinic averages/totals of other clinics with their local agency and state wide clinic level averages/totals.

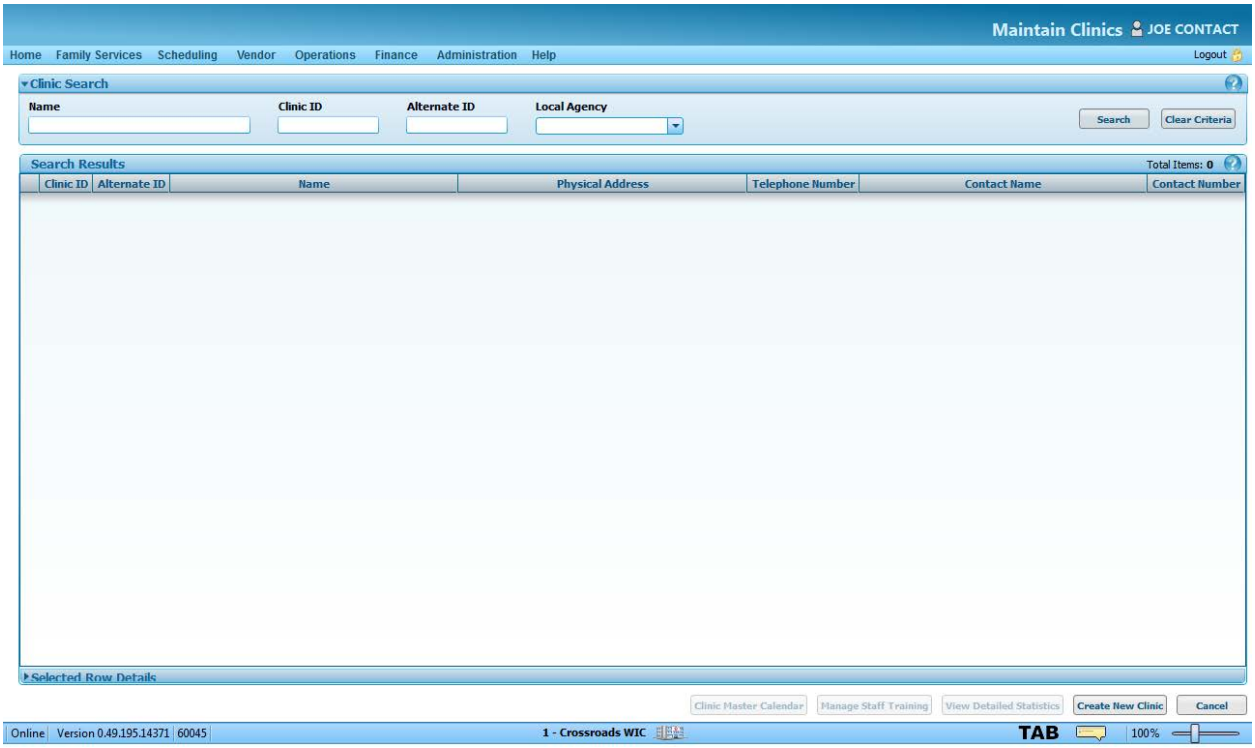
This process includes the following tasks:

Task A. Creating a Clinic 15-41
Task B. Searching and Editing a Clinic 15-48
Task C. Adding User to Location 15-51
Task D. Managing Staff Training 15-53

Task A. Creating a Clinic

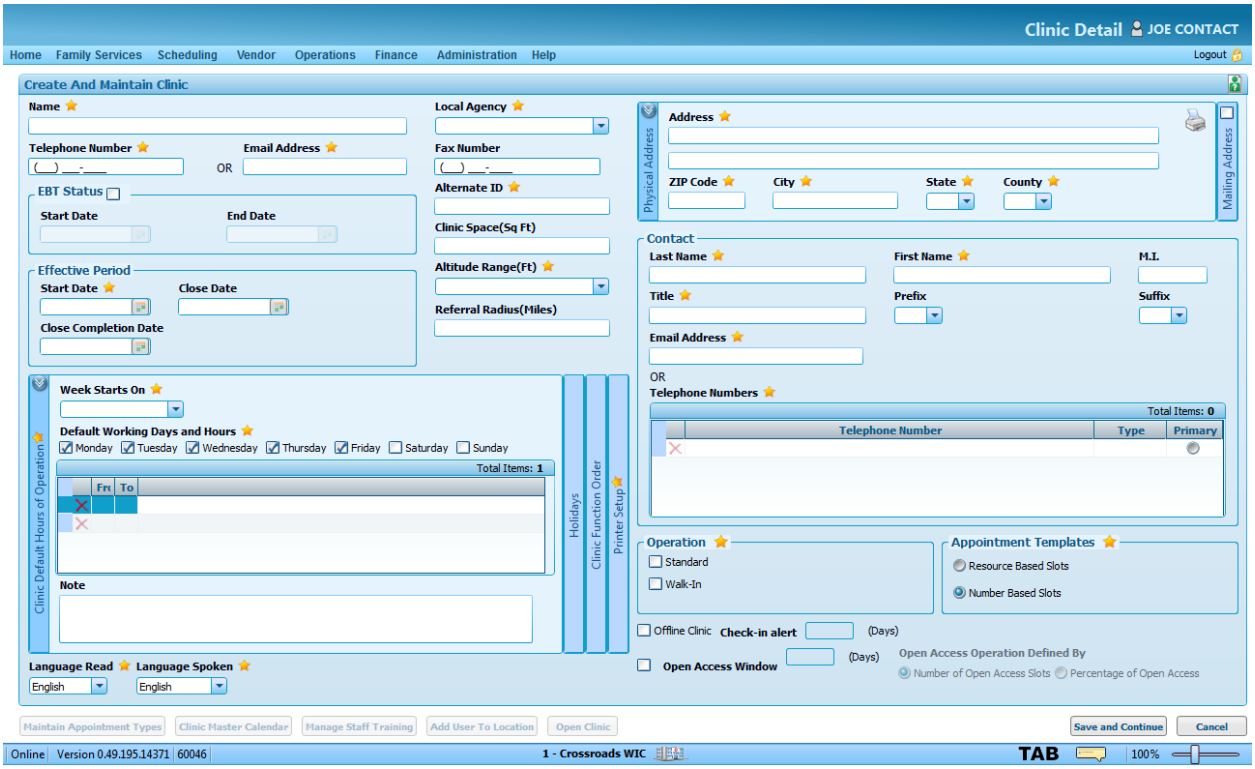
Complete the following steps to perform this task:

1. From the **Home** screen, go to the **Operations → Setup → Maintain Clinics**. The **Maintain Clinic** screen displays.

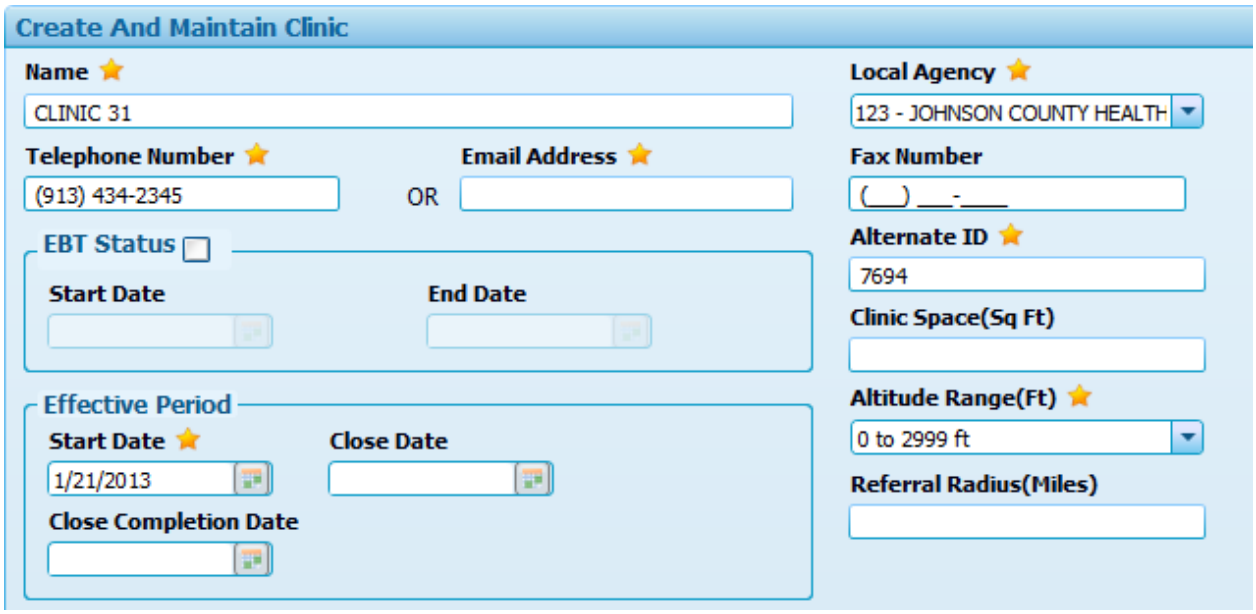


It is necessary to be logged in at the local agency or state level to perform this task.

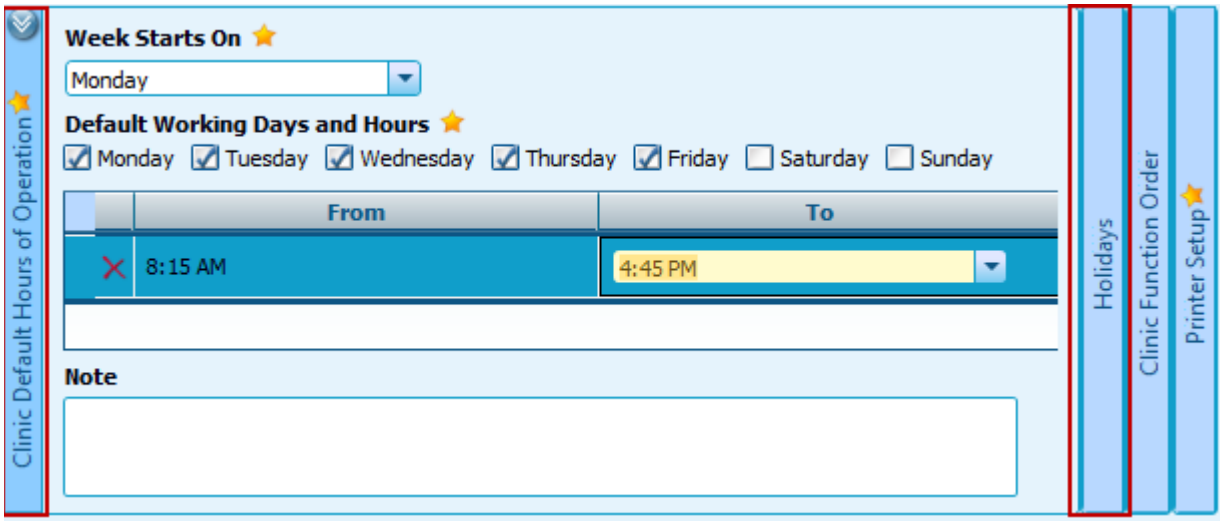
2. Click on **Create New Clinic**. The **Clinic Detail** screen displays.



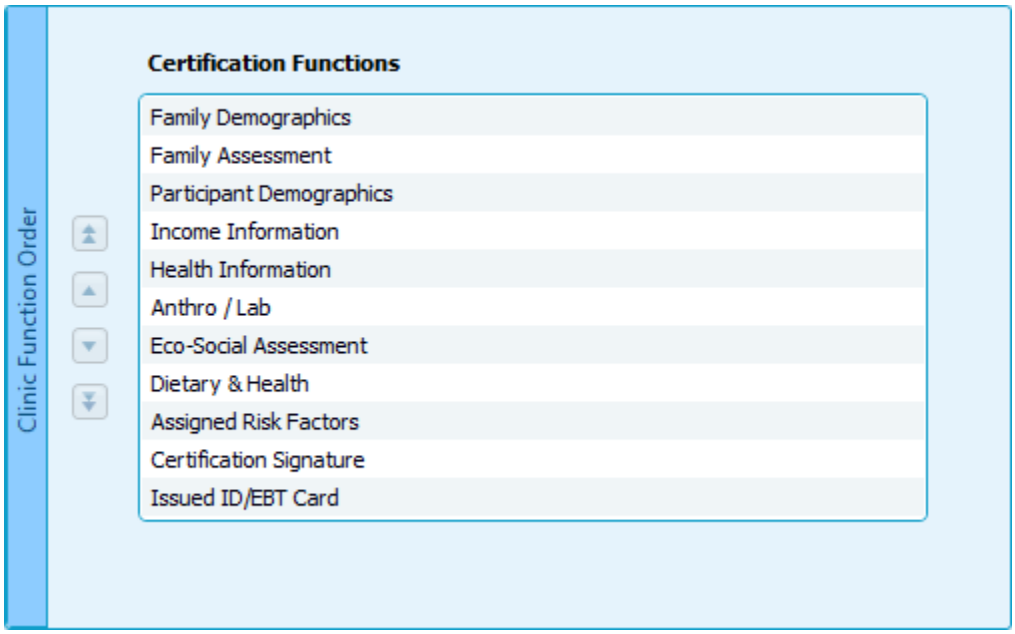
3. Under **Create And Maintain Clinic**, complete the following:
    - Enter the **Name**.
    - Select the **Local Agency**.
    - Enter the **Telephone Number** (optional if entering email).
    - Enter the **Email Address** (optional if entering telephone number).
    - Enter the **Fax Number** (optional).
    - Enter an **Alternate ID**.
    - Enter **Clinic Space (Sq Ft)**.
    - Select the **Altitude Range (Ft)**.
    - Enter the **Referral Radius (Miles)** (optional).
    - If using EBT, check the **EBT Status** box.
    - Enter or select the **Start Date**.
    - Enter or select the **End Date**.
4. Under **Effective Period**, complete the following:
    - Select the **Start Date**.
    - Select the **Close Date** (optional).
    - Select the **Close Completion Date** (optional).



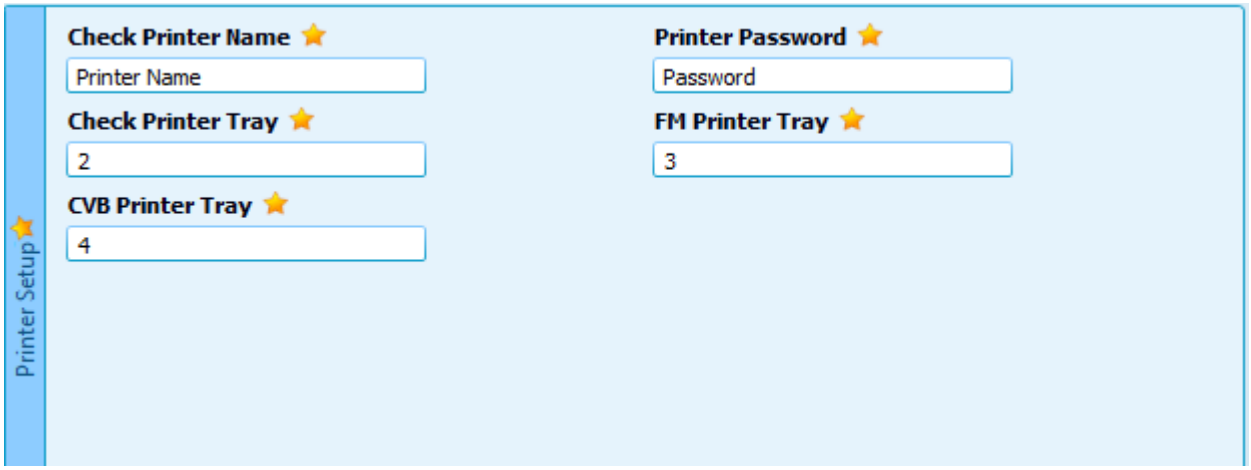
5. Within the **Clinic Default Hours of Operation**, Select a day from the **Week Starts On** drop down list.
6. Click the boxes for **Default Working Days and Hours**.
7. Select the **From** time.
8. Select the **To** time.



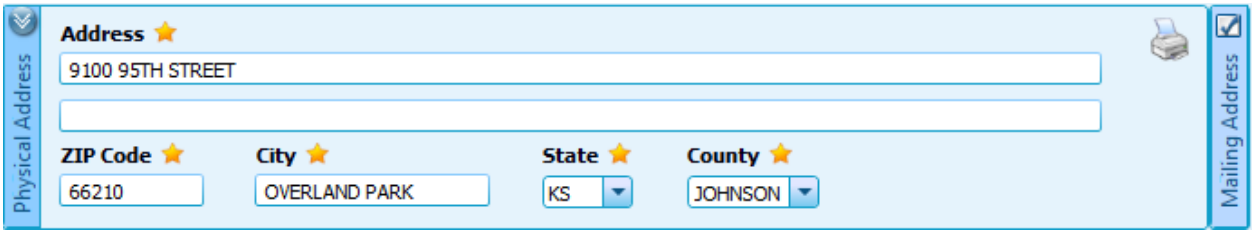
9. Click on the **Holiday** slider bar. The current year holiday schedule displays.
10. Click on the **Clinic Function Order** slider bar. The certification functions display.
11. Click on the arrow buttons to rearrange the **Certification Functions** order.



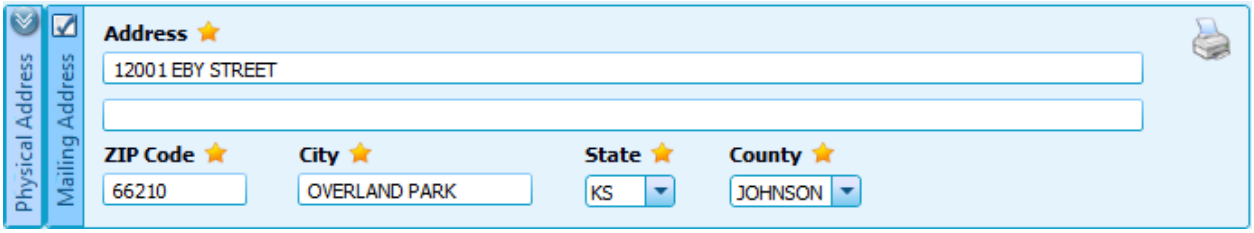
12. Complete the **Printer Setup** information.



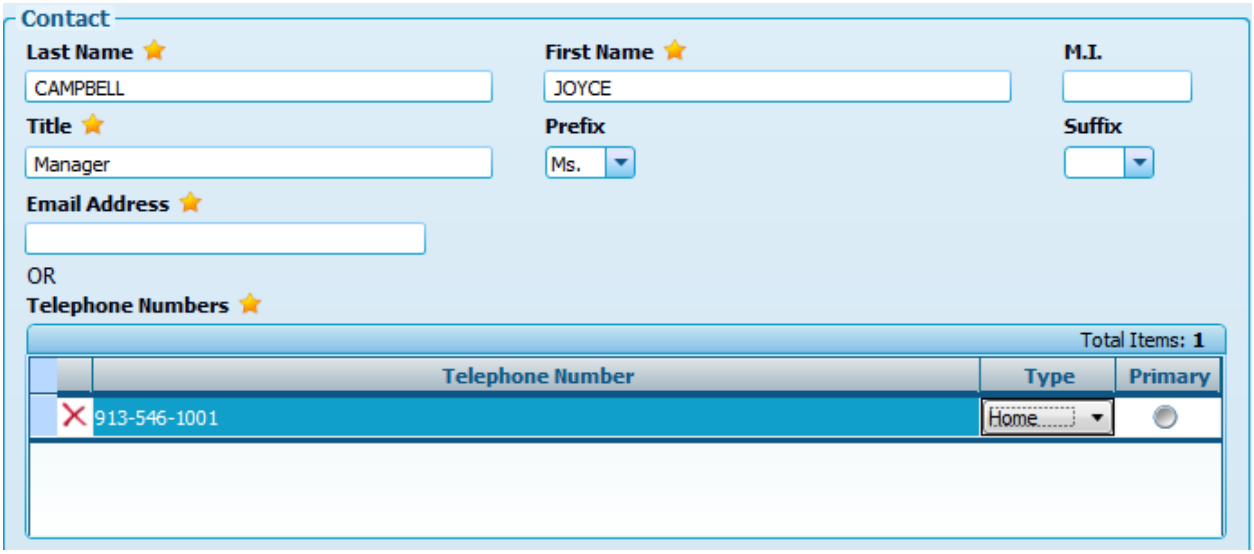
13. Select the **Language Read**.
14. Select the **Language Spoken**.
15. Complete the **Physical Address**.



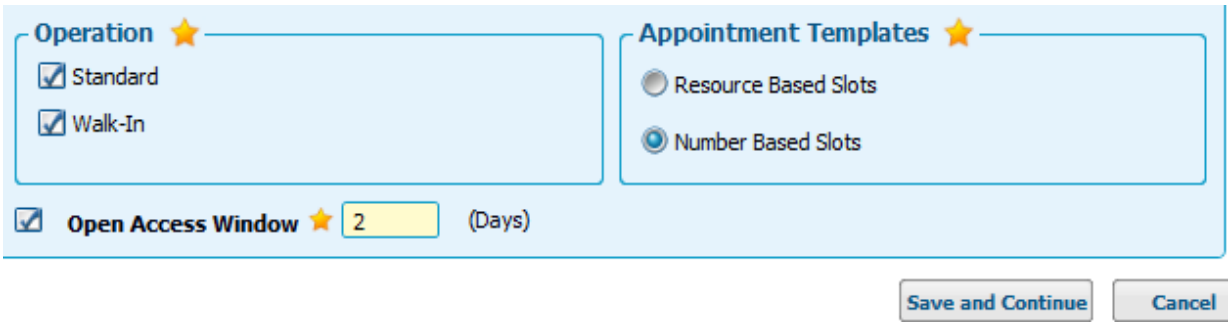
16. Click the **Mailing Address** slider bar check box if it differs from the physical address. Complete the address information.



17. Within the **Contact** box, complete the following:
    - Enter the **Last Name**.
    - Enter the **First Name**.
    - Enter the **Title**.
    - Select the **Prefix** (optional).
    - Select the **Suffix** (optional).
    - Enter the **Email Address** (optional if entering telephone number).
    - Enter **Telephone Numbers** (optional if entering an email address).



18. Under **Operation**, click on the appropriate check boxes.
19. Under **Appointment Templates**, click the correct radio button to select **Resource Based Slots** or **Number Based Slots**.



Selecting Resource Based Slots requires the clinic's master calendar to be built using various resources such as specific individuals or generic user roles (i.e. CPA or Nutritionists).. Selecting Number Based Slots does not require the use of specific resources, but does require the number of concurrent slots to be defined to build the clinic's master calendar.

20. If using **Open Access**, click the **Open Access Window** check box and enter the number of days.

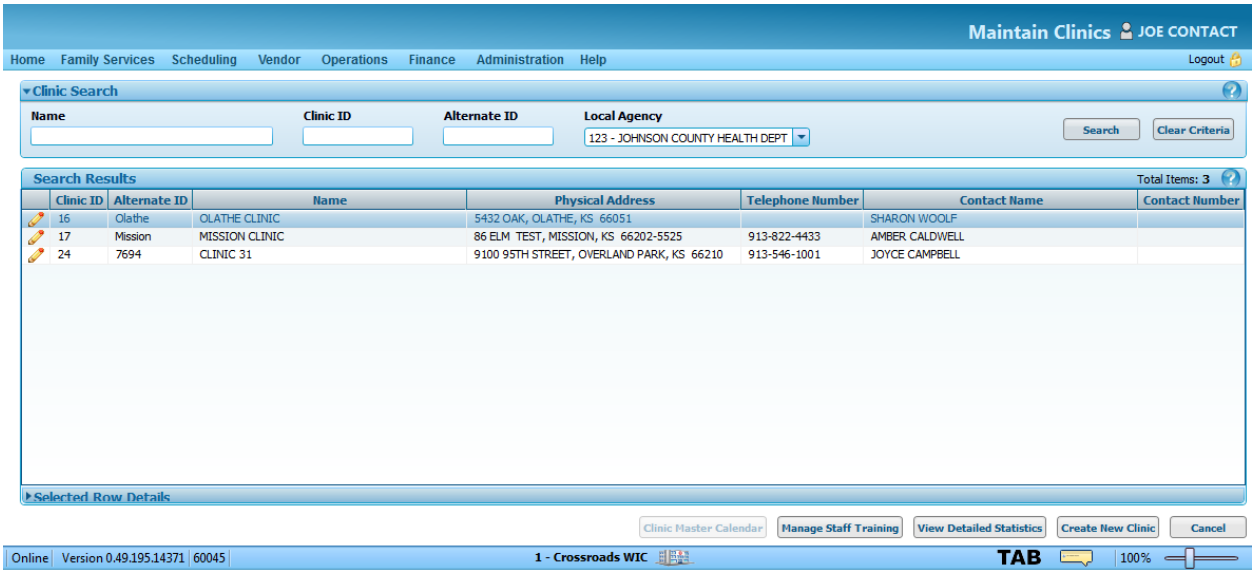
Open Access enables a location to reserve appointment slots for each defined calendar day until a certain point in time is reached. The point in time is defined by the number of days entered. Until the point in time is reached, users cannot schedule appointments into the reserved appointment slots.

21. Click **Save and Continue**. The screen refreshes and status message displays indicating new clinic information was saved successfully.

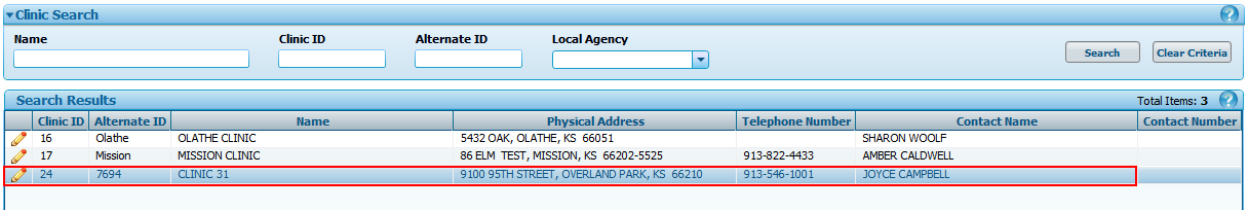
Task B. Searching and Editing a Clinic

Complete the following steps to perform this task:

1. From the **Home** screen, go to the **Operations → Setup → Maintain Clinics**. The **Maintain Clinics** screen displays.

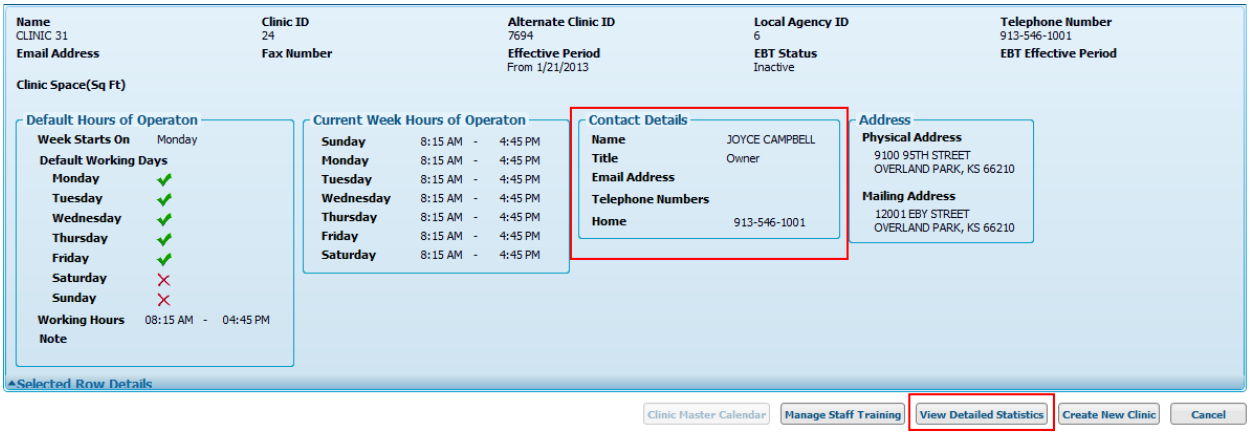


2. Under **Clinic Search**, enter one of the displayed search criteria options.
3. Click **Search**. The screen refreshes and the search results display on the grid.

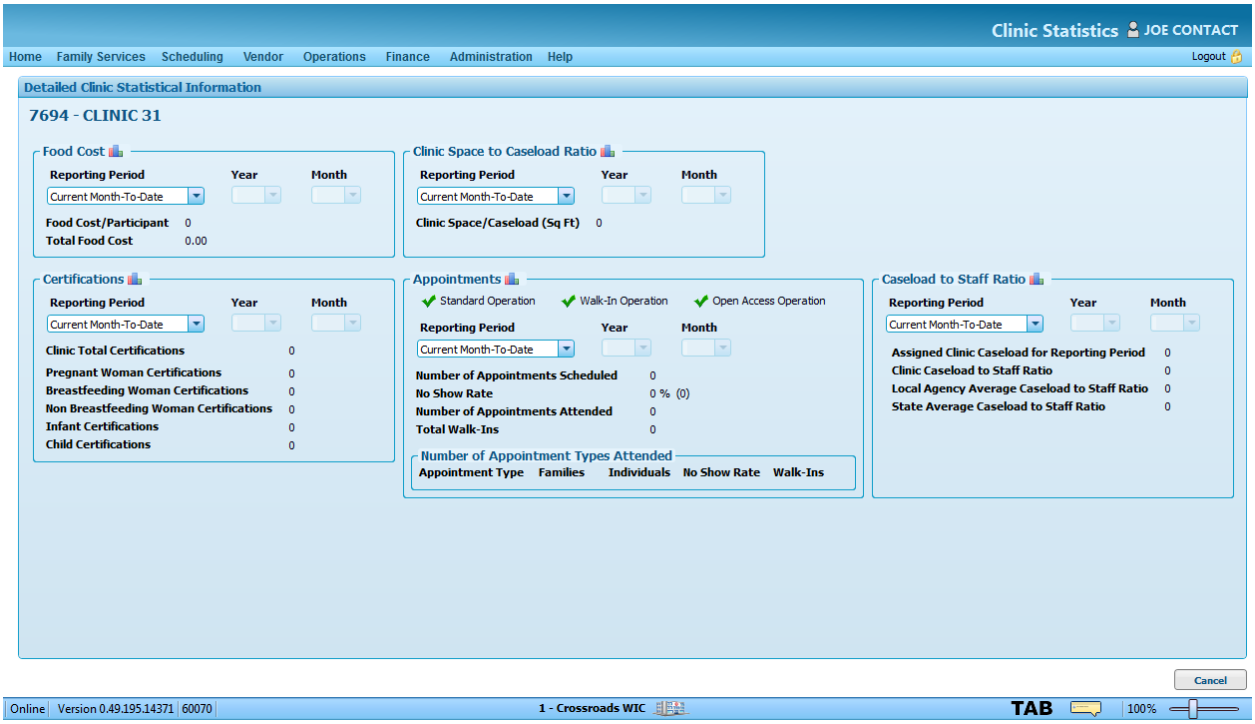


4. Select a clinic and click the **Selected Row Details** arrow. Displayed are the details entered when the clinic was created.

5. Click the **Edit** button ( ). You are directed to the **Clinic Detail** screen.
6. Make the necessary changes.
7. Click **Save**. The screen refreshes and status message displays indicating the information was saved successfully. You are returned to the **Maintain Clinics** screen.
8. Highlight the clinic and click on the **Selected Row Details** arrow to view the changes. In this case, the **Title** was changed from Manager to Owner.



9. Select the **View Detailed Statistics** button and you are directed to the **Clinic Statistics** screen.



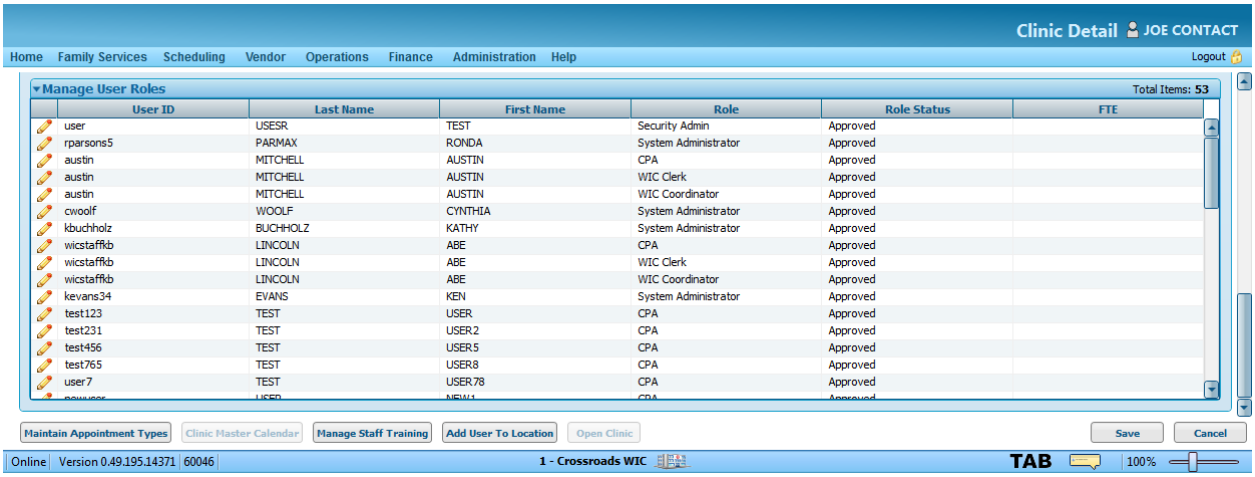
Selecting the Clinic Master Calendar button displays the appointment scheduling screen.

Click the Manage Staff Training button to manage staff training as needed.

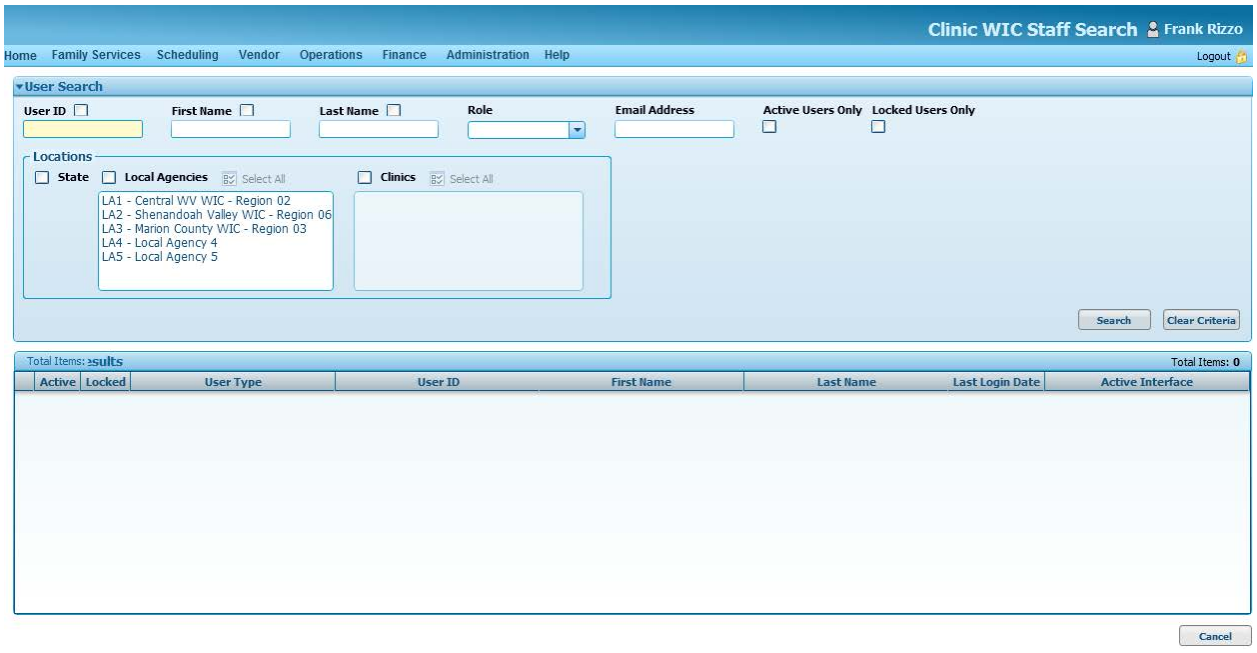
Task C. Adding User to Location

Complete the following steps to perform this task:

1. Click the expand/collapse arrow on the **Manage User Roles** container at the bottom of the **Clinic Details** screen. The list of users for this clinic displays.

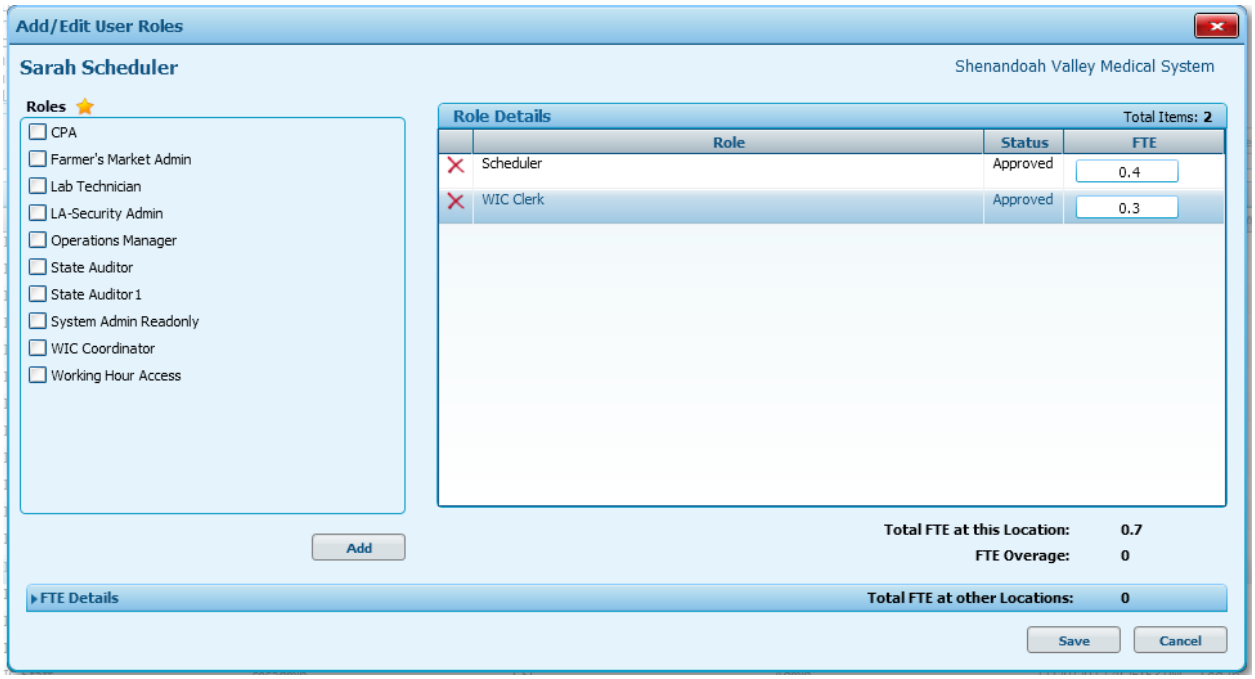


2. To add a user to the clinic, click **Add User to Location**. The **Clinic WIC Staff Search** screen displays.



3. Search for and select a user to add to the location.

4. Click the **Add User** button and the **Add/Edit User Roles** screen displays.



5. Select the **Roles** for this staff for this clinic and click **Add**. The roles are added to **Role Details** grid.
6. Enter the **FTE** for each of the roles for this clinic.
7. Click **Save**. A status message displays indicating success at adding these roles for the clinic.

To confirm the staff role has been added to clinic, click Cancel. The Clinic Detail screen displays, showing the added staff role with the FTE as indicated.

Task D. Managing Staff Training

Complete the following steps to perform this task:

1. To manage staff training, provided you have this role function, click **Manage Staff Training**. The **Manage Staff Training** screen displays. For details, review the Defining and Managing Staff Training scenario under the Manage Staff Training Functional area.

Congratulations!

You have successfully completed the **Maintain Clinics** process.

Maintain Assessment Questions

This scenario explains the process of managing assessment questions used in the certification assessment process.

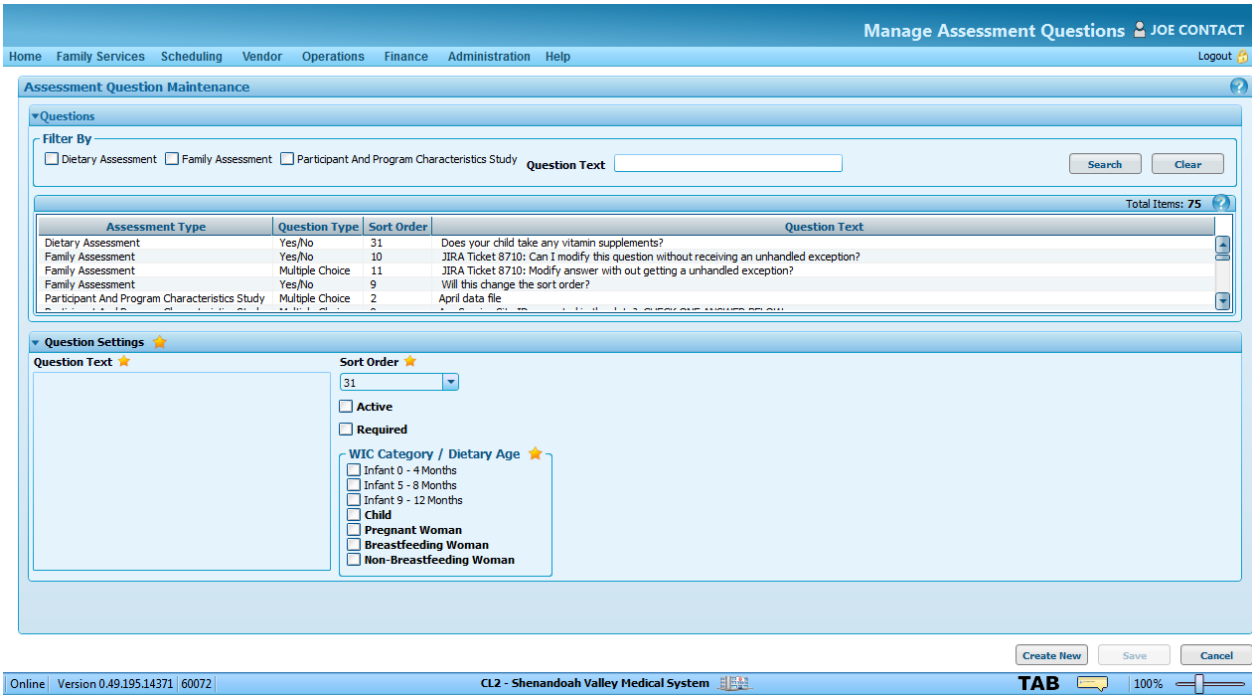
This process includes the following tasks:

Task A. Searching for Assessment Questions 15-55
Task B. Modifying an Assessment Question 15-56

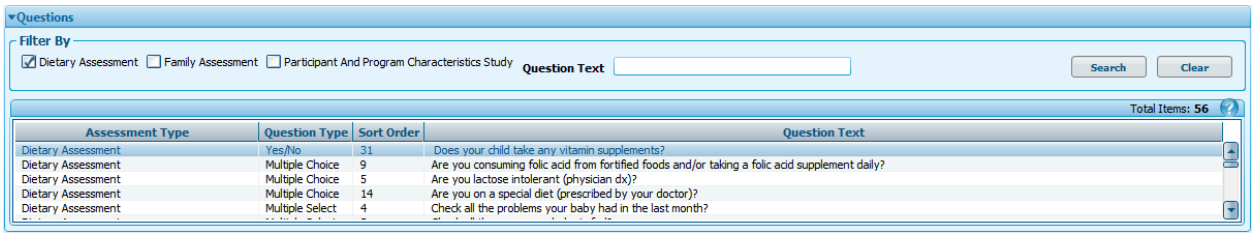
Task A. Searching for Assessment Questions

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → Setup → Maintain Assessment Questions**. The **Manage Assessment Questions** screen displays.



2. Under **Filter By**, select or enter one or more of the following:
   - **Dietary Assessment**
   - **Family Assessment**
   - **Participant and Program Characteristics Study**
   - **Question Text**
3. Click **Search**. The grid is updated to display results of the search.

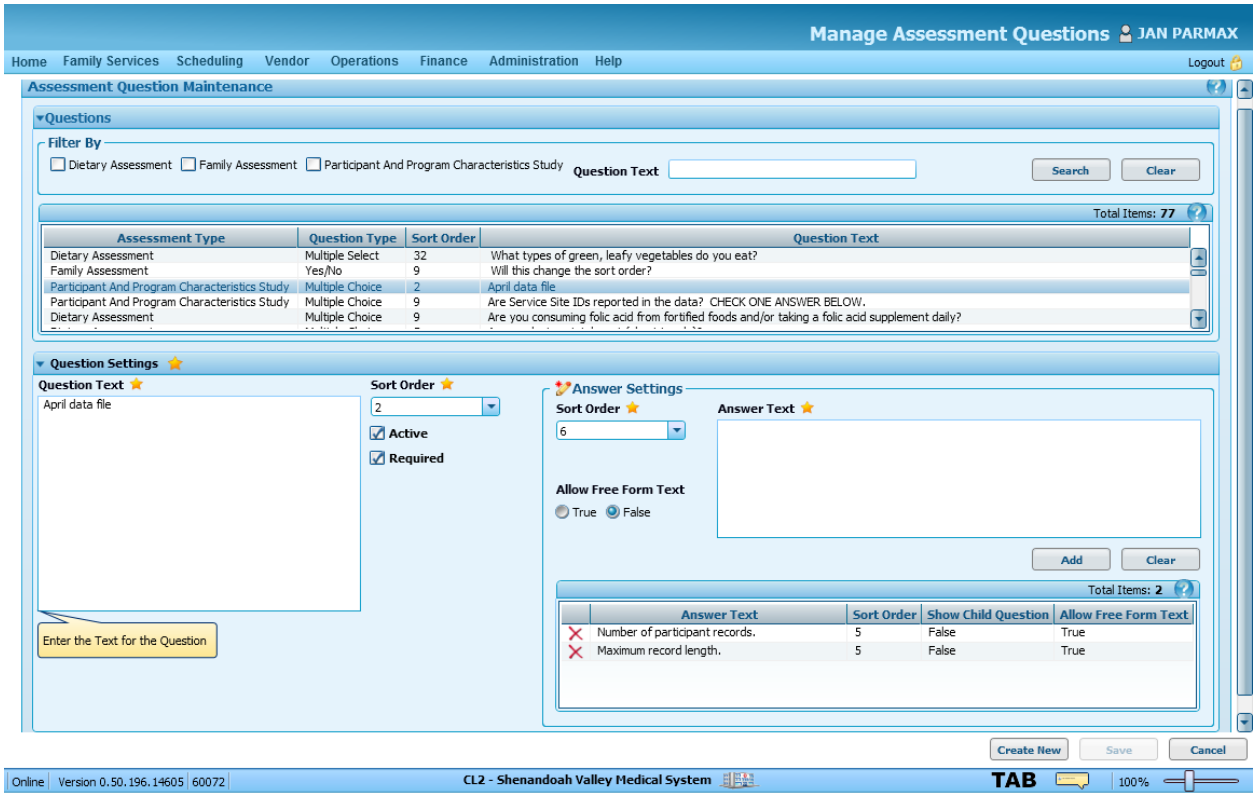


Task B. Modifying an Assessment Question

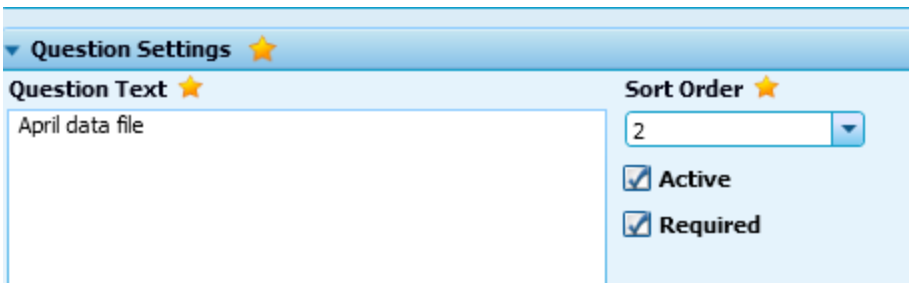
Complete the following steps to perform this task:

1. To modify a question, select the question by clicking on the row in the **Questions** search grid. The **Question Settings** in the lower panel pre-fills with the settings for that question.

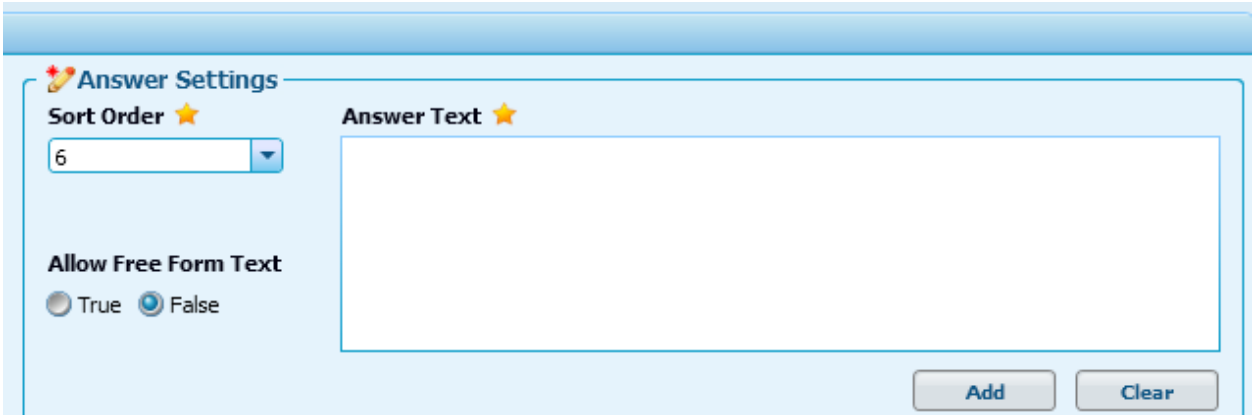
The screen below shows the blank fields before a question is selected. The screen above, showing the results of a search for "folic" in the question text, shows the settings for the question in the highlighted row.



2. To modify the setting for a question do the following for each option in **Questions Settings**:
   - Select the **Active** check box to have the question active in the **Crossroads Assessment** section.

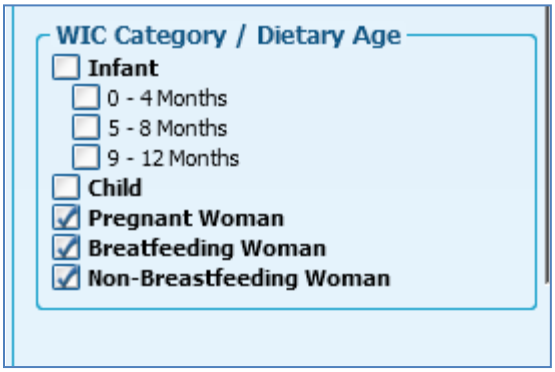


- Enter the **Sort Order** to determine what order the question will appear in the assessment section.

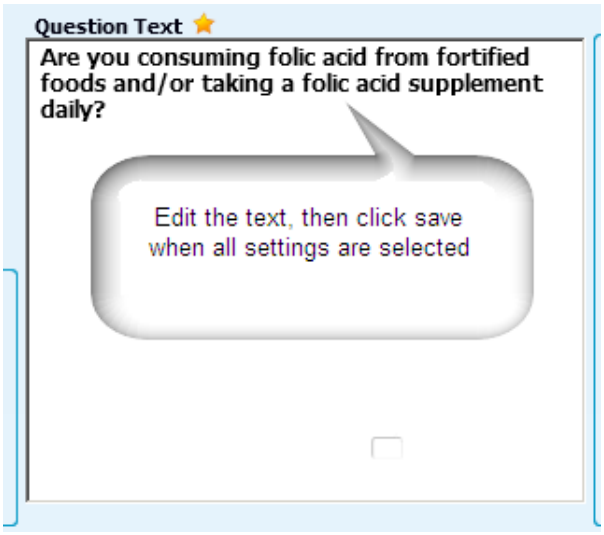


- Select the **WIC Category/Dietary Age** in order to select WIC categories and/or ages of WIC participants for which the question will appear in the assessment section.

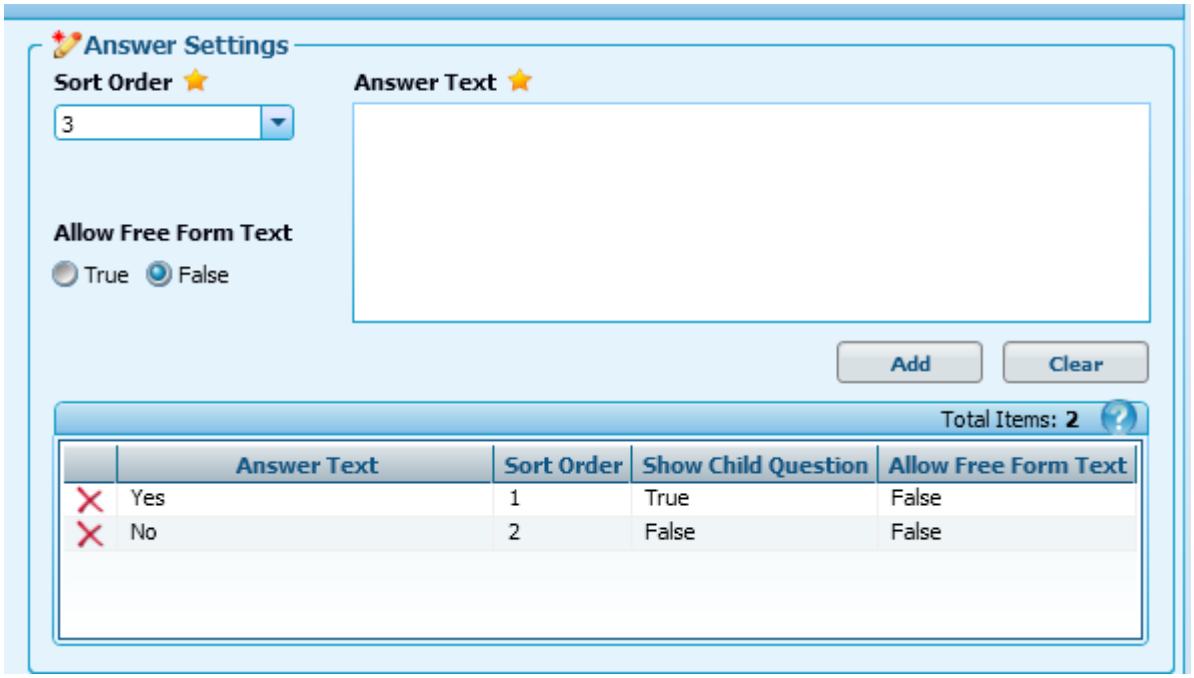
This question displays for all groups of women, but not for infants or children.



- Enter or modify the **Question Text** to determine how the question displays in the assessment section.


Question Text
Are you consuming folic acid from fortified foods and/or taking a folic acid supplement daily?
Edit the text, then click save when all settings are selected

3. To modify the settings for an answer do the following for each option in **Answer Settings**:



- Add the **Answer Text.**
- Select the **Sort Order**.
- Under **Allow Free Form Text**, click **True** to allow free form text.
- Click **Add**.
- Repeat entering **Answer Text** until all possible answers are inserted in the grid.
- When the question and answer setting have been completed, click **Save**.

Congratulations!

You have successfully completed the **Maintain Assessment Questions** process.

Maintain Breast Pump Issuance Questions

This scenario explains the process of managing assessment questions used in the breast pump issuance process.

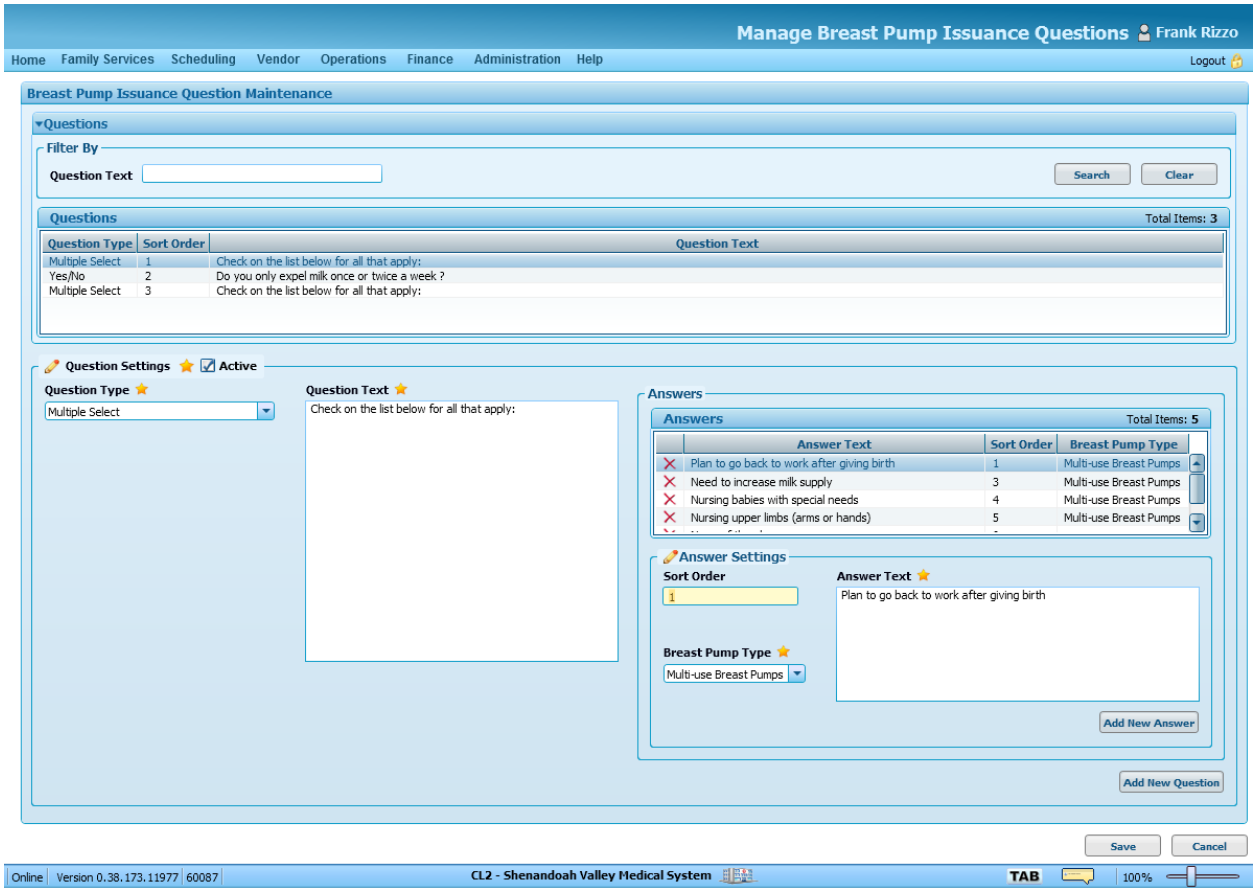
This process includes the following tasks:

Task A. Searching for Assessment Questions 15-61
Task B. Modifying an Assessment Question 15-63

Task A. Searching for Assessment Questions

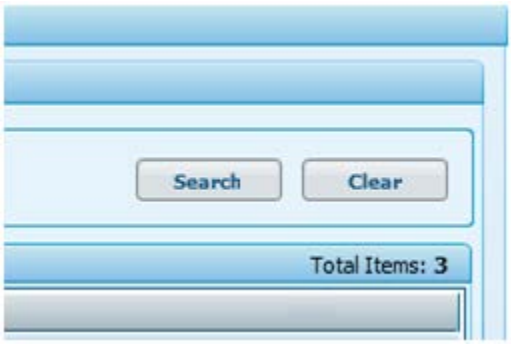
Complete the following steps to perform this task:

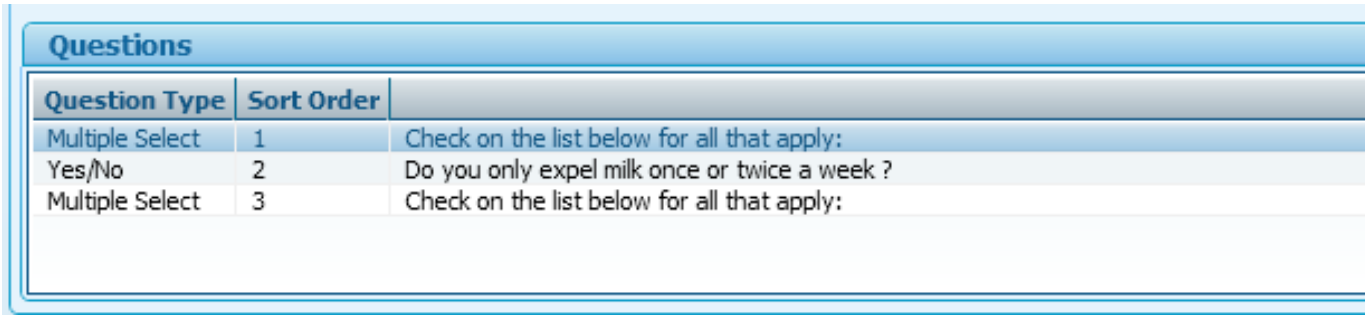
1. From the **Home** screen, go to **Operations → Setup → Maintain Breast Pump Issuance Questions**. The **Manage Breast Pump Issuance Questions** screen displays.



2. Under **Filter By**, enter a question text string to conduct a search:

3. Click **Search**. The grid is updated to display results of the search.



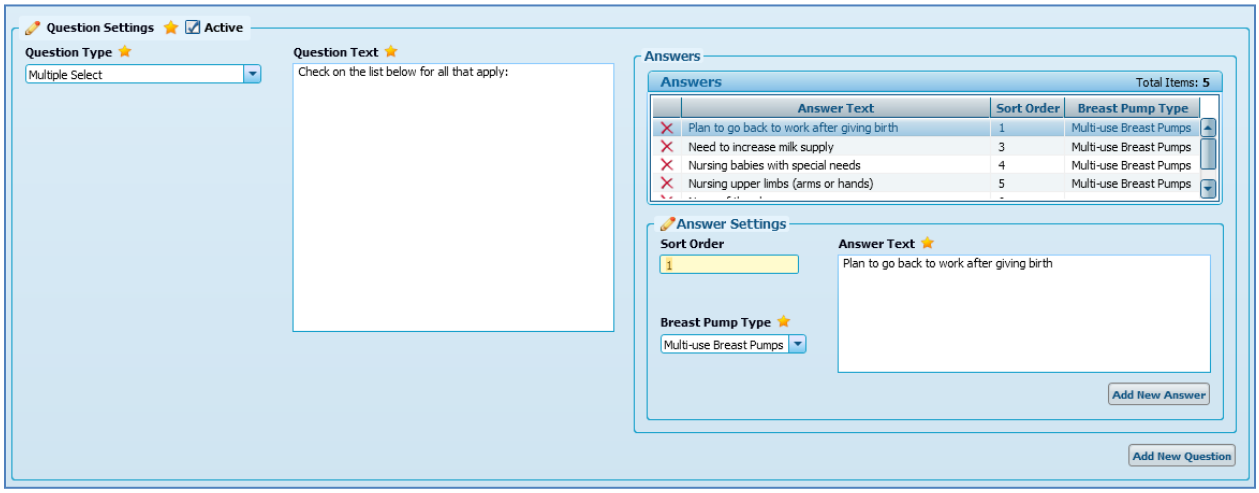

Questions
Question Type
Sort Order
Multiple Select 1 Check on the list below for all that apply:
Yes/No 2 Do you only expel milk once or twice a week ?
Multiple Select 3 Check on the list below for all that apply:

Task B. Modifying an Assessment Question

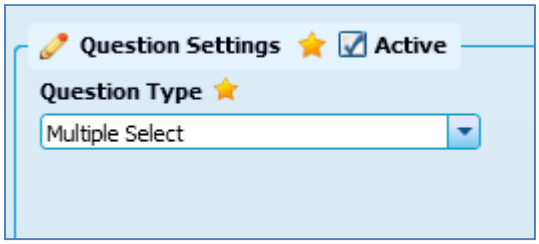
Complete the following steps to perform this task:

1. To modify a question select the question by clicking on the row in the **Questions** search grid. The **Questions Settings** in the lower panel pre-fills with the setting for that question.

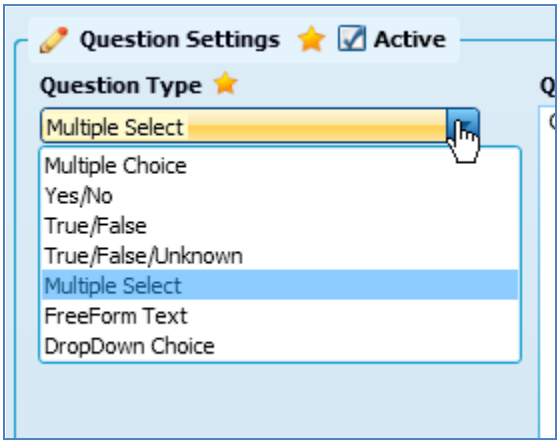
The screen below shows the fields with a Multiple Select Question Type selected. The Question Text and Answer Text are shown in their respective boxes.



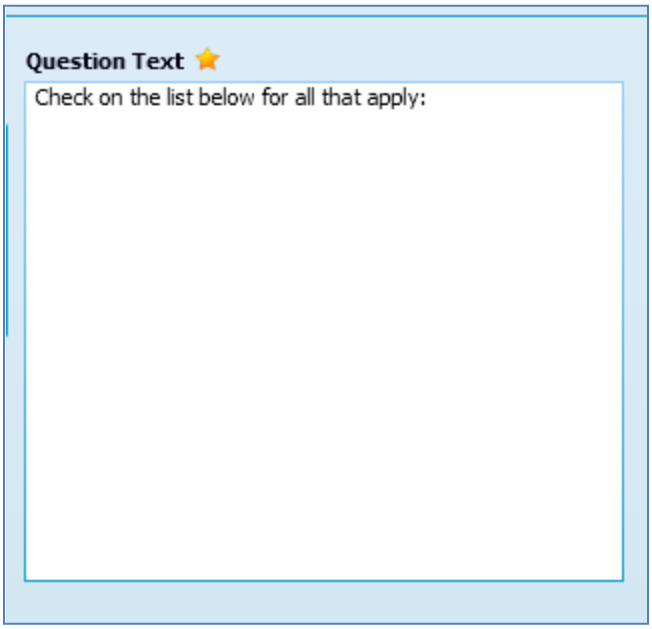
2. To modify the setting for a question do the following for each option in **Questions Settings**:
   - Check **Active** to have the question active in the **Crossroads Assessment** section.



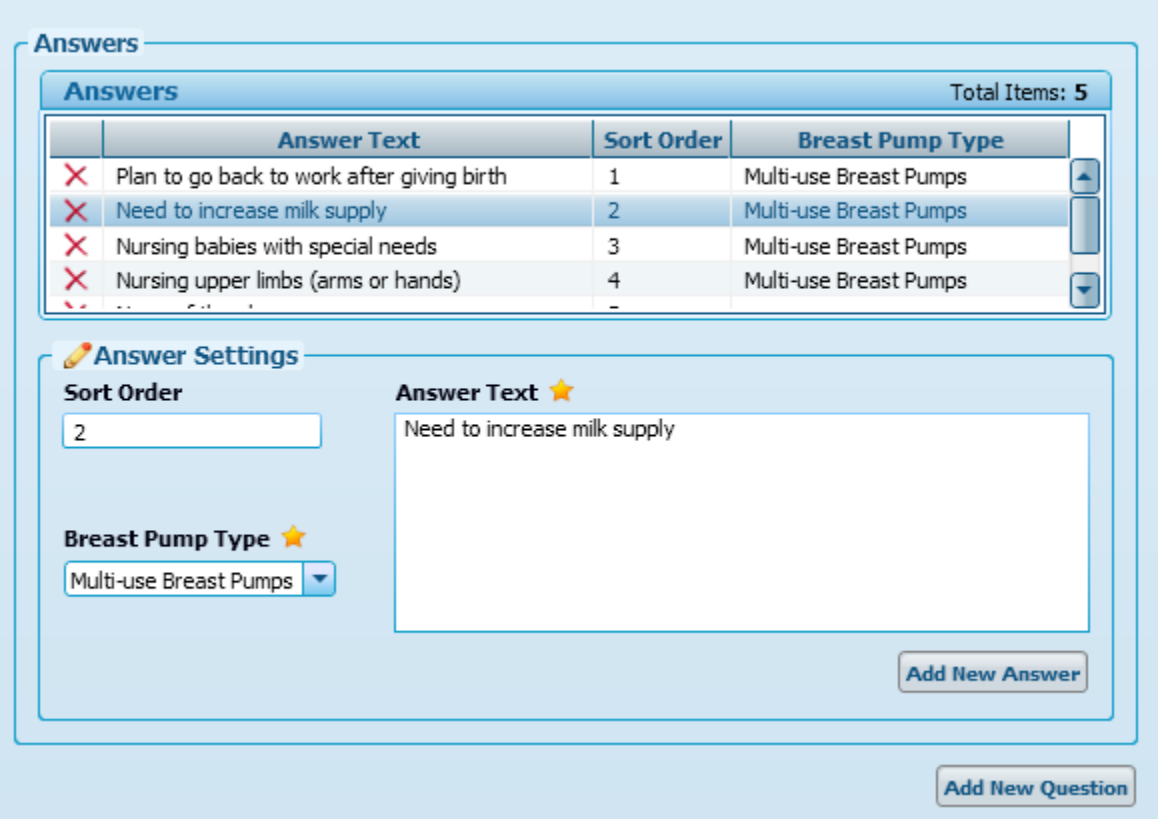
- Select **Question Type** to specify the format for the answer to the question.



- Enter or modify the **Question Text** to determine how the question displays in the assessment section.



- To modify the settings for an answer do the following for each option in **Answer Settings**:



  - Click **Add New Answer** then add the answer in the **Answer Text** box.
  - Enter a number in **Sort Order** to show the order of the answers.
  - Select the **Breast Pump Type** that would be indicated for this answer.
  - Repeat entering **Answer Text** until all possible answers are inserted in the grid.
  - When the question and answer setting have been completed, click **Save**.

Congratulations!

You have successfully completed the **Maintain Breast Pump Issuance Questions** process.

Maintain Communication Types

The **Manage Family Communication Types** screen provides users with the ability to maintain templates to be used in the communication process. Communications (or notifications) happen throughout system.

Appointment-specific communications are used to notify families/participants of scheduling activities (Scheduled, Re-scheduled, Missed and Cancelled) for both electronic and physical mail, for appointments and nutrition education classes. The list of appointment communication types is based on clinic's appointment types and is therefore a clinic management function.

When a clinic user creates a new appointment type, a placeholder is created for communication to be established. By default, appointment communications is set up for the four system-defined appointment types (Initial Certification, Subsequent Certification, Food Benefit Issuance and Nutrition Education – While appointment communications is managed at the clinic level, all other communications can be managed at either the state, local agency or clinic level. When a user navigates to the **Manage Family Communication Types** screen, all communication types managed at the level currently being accessed by the user are shown. As an example, when a user is signed in at a clinic level, appointment type communications and all other communications for the specific clinic are shown.

The **Manage Family Communication Types** screen provides the following functions:

- Create new communication types.
- Modify existing communication types.

This process includes the following tasks:

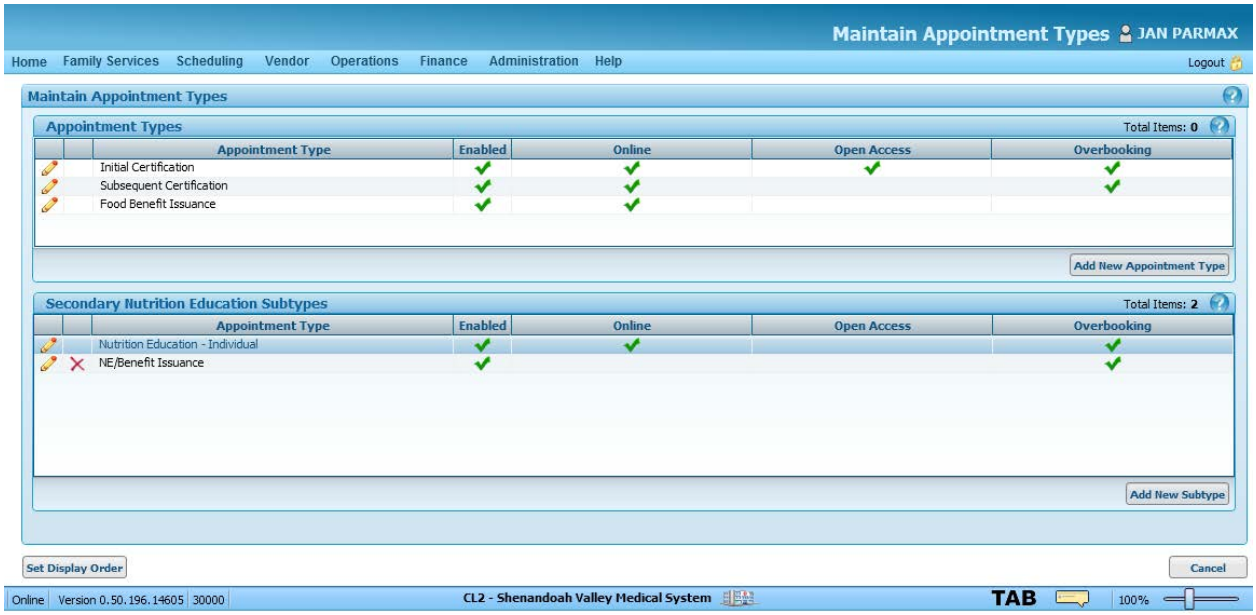
Task A. Create a New Communication Type..... 15-67

Task B. Modify an existing Communication Type..... 15-70

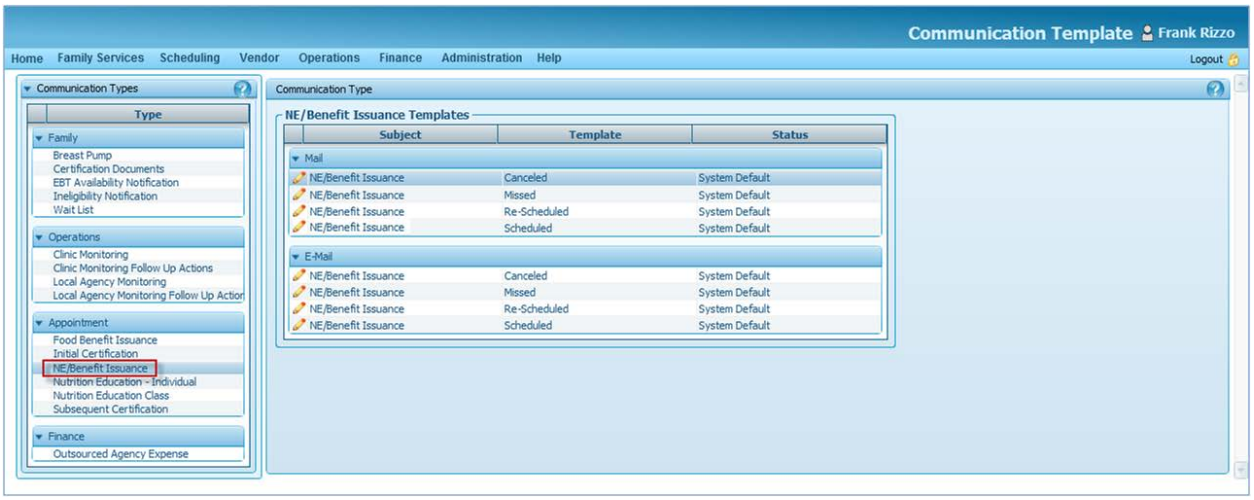
Task A. Create a New Communication Type

Complete the following steps to perform this task:

1. It is only possible to create a new communication type in Crossroads without adding code by creating a new appointment type from the **Maintain Appointment Types** screen. (See Maintaining Appointment Types scenario in this manual.)

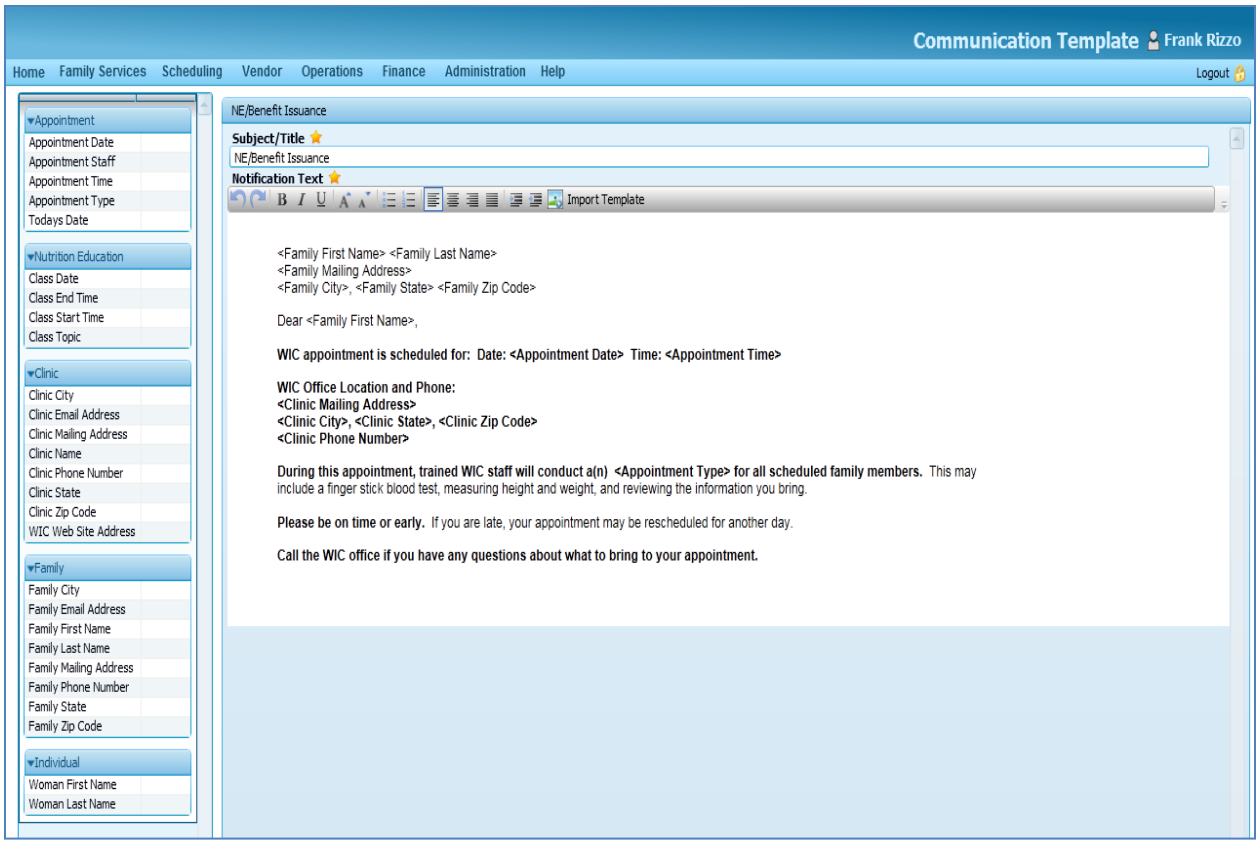


A new appointment type is created on the Manage Appointment Types screen in order to illustrate the creation of new communication types.



After the new appointment type is created a default set of templates are created based on the four templates needed for appointment types. The scheduled template is shown by clicking the Edit button ( ).

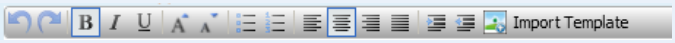
2. To create the language needed for the communication template for the appointment type click on the **Edit** button ( ) for the message you would like to create (or modify in this case since the systems provides a default communication). The standard default template displays.



3. Edit the template to create the communication desired for this appointment type.

Use standard word processing to change or add appropriate language. Text that is surrounded by "<" and ">" (data tags) is information that will be added to the document during the creation process. For example, <Appointment Date> and <Appointment Time> populate with the unique appointment date and appointment time for each family receiving the communication. The data tags are added to the document by placing the cursor in the letter body and double-clicking the desired data tag in the data tag bank on the left-hand side of the screen.

The Notification Text toolbar is displayed below.



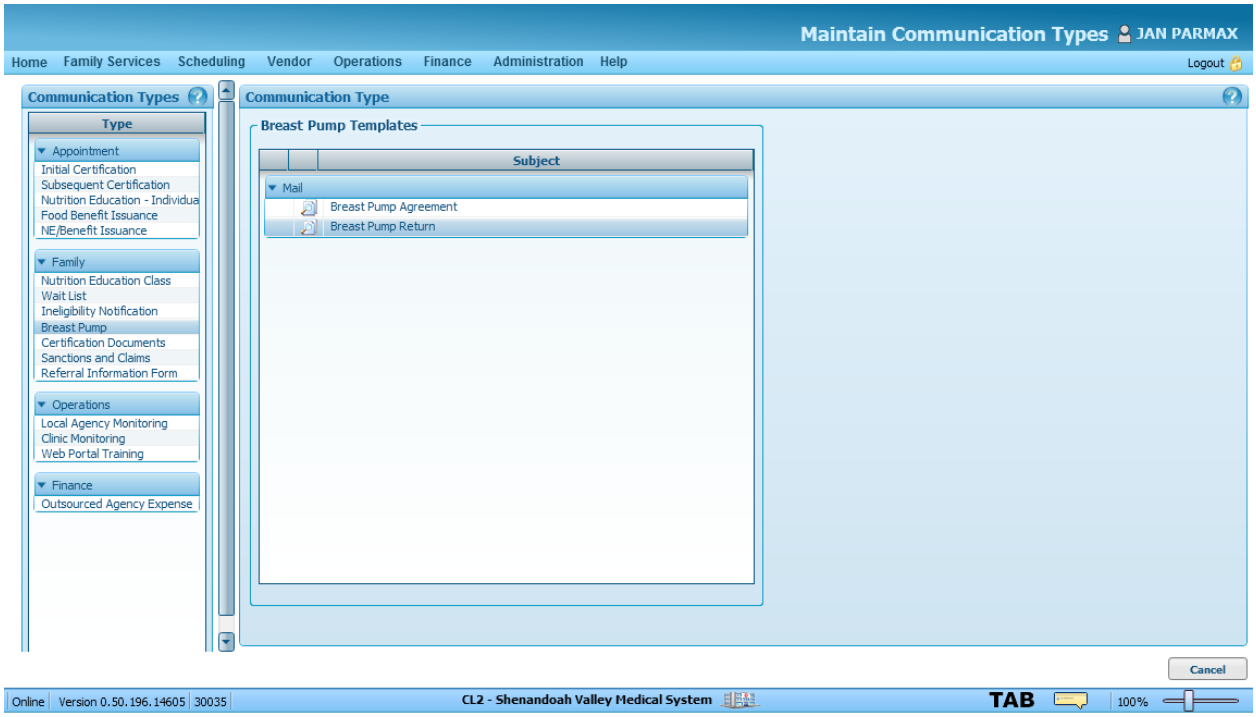
You can click Import Template to import a template as necessary.

Users can import an RTF file which has state letter head or other graphics. It is possible to create an RTF in any language, upload and associate to that language. For example, an RTF can be created in German, so a German letter is sent when the German language is selected for the communication.

Task B. Modify an existing Communication Type

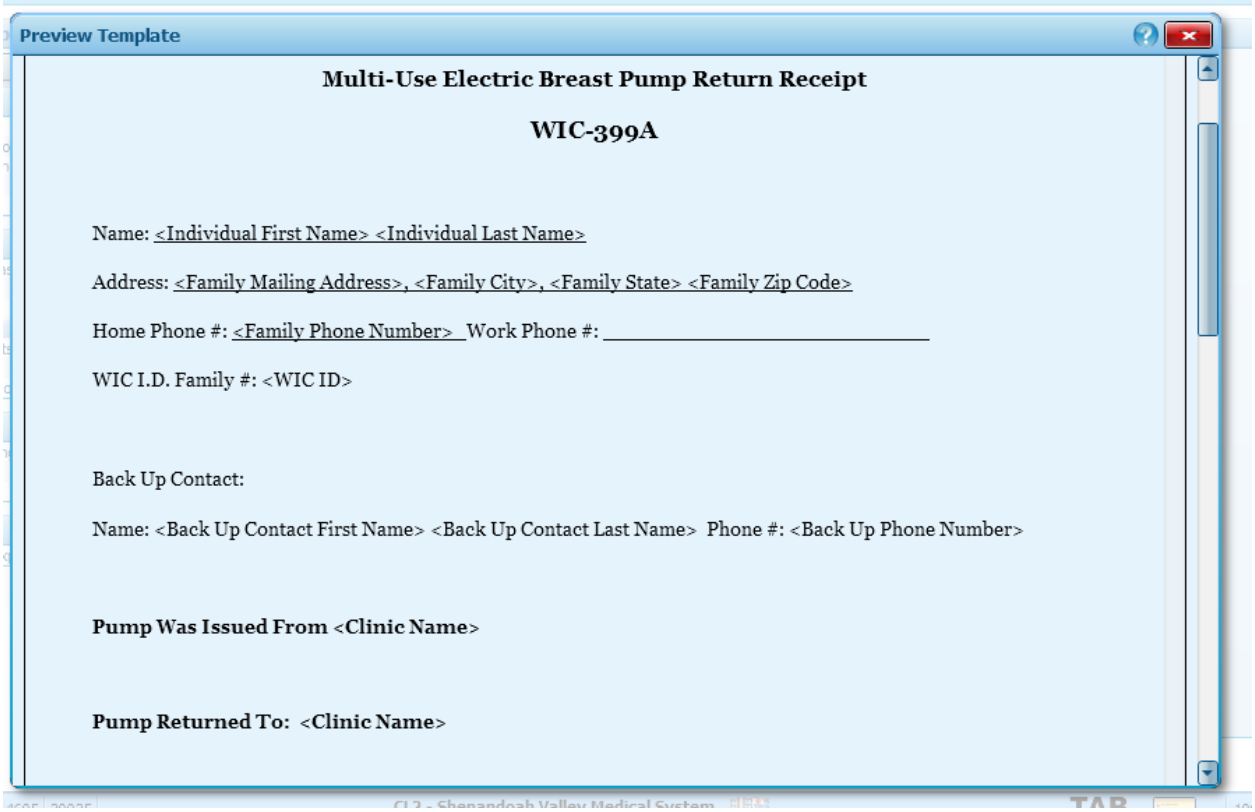
Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → Setup →Maintain Communication Types**. The **Manage Communication Types** screen displays.



2. Select the **Type of Communication Type** you would like to modify.

This screen above shows the selection of a Breast Pump Return Type.



3. Select the **Communication Type** to modify.
4. Make the modifications necessary using standard word processing and click **Save**. A status message indicates success at modifying the communication type.

Congratulations!

You have successfully completed the **Maintain Communication Types** process.

Maintain Functional Areas

This scenario explains the process of adding monitoring tasks and creating functional areas.

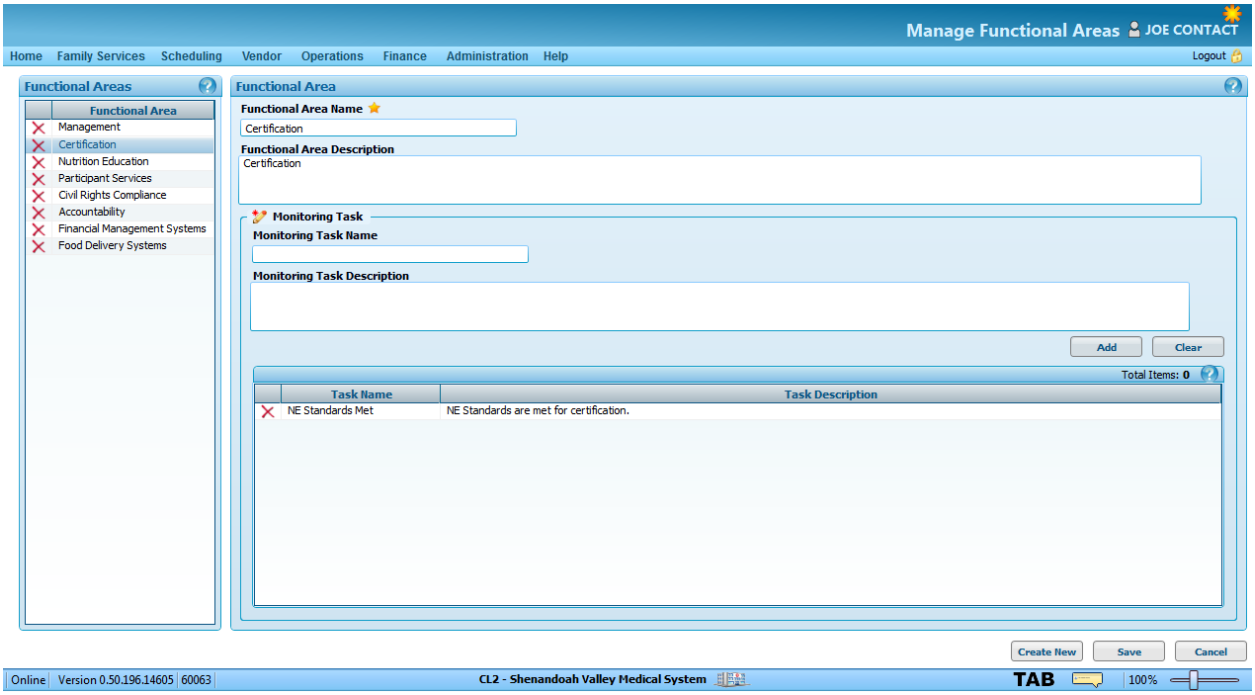
This process includes the following tasks:

Task A. Adding a Monitoring Task for Each Functional Area..... 15-73
Task B. Creating New Functional Areas 15-74

Task A. Adding a Monitoring Task for Each Functional Area

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → Setup → Maintain Functional Areas**. The **Maintain Function Areas** screen displays.



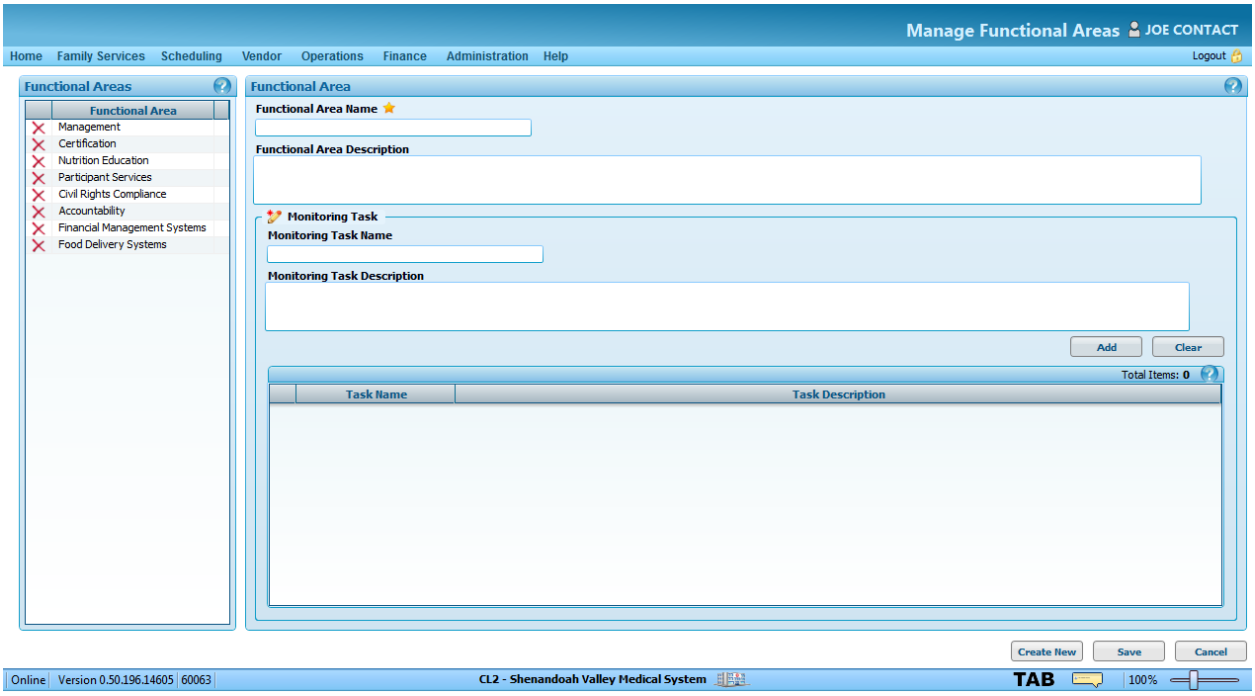
2. To add monitoring task to a functional area, click on the **Functional Area** in the left panel. The **Functional Area Name** and **Description** pre-fill in the right **Functional Area** input grid.
3. Complete the following to add monitoring tasks to each functional area:
   - **Monitoring Task Name**
   - **Monitoring Task Description**
4. Click **Add**. The monitoring task is added as a new row in the **Monitoring Task** grid.
5. When monitoring tasks have been added, click **Save**. The new monitoring tasks are now associated with the functional areas.

The Functional Areas will now pre-fill in the Functional Areas of the Local Agency Monitoring screen.

Task B. Creating New Functional Areas

Complete the following steps to perform this task:

1. If a new functional are is required, click **Create New**. The **Functional Area** input fields are cleared, ready to have a new functional area defined.



2. Complete the following to create a new functional area:
   - **Functional Area Name**
   - **Functional Area Description**
3. For each monitoring task to be associated with the functional area enter:
   - **Monitoring Task Name**
   - **Monitoring Task Description**
4. Click **Add**. The monitoring task is added as a new row in the **Monitoring Task** grid.
5. When functional areas have been added, click **Save**. The new functional areas are added to the **Functional Area** grid.

Congratulations!

You have successfully completed the **Maintain Functional Areas** process.

Maintain Risk Codes

The **Maintain Risk Codes** screen allows the user to view and maintain the risk codes used by the Crossroads system.

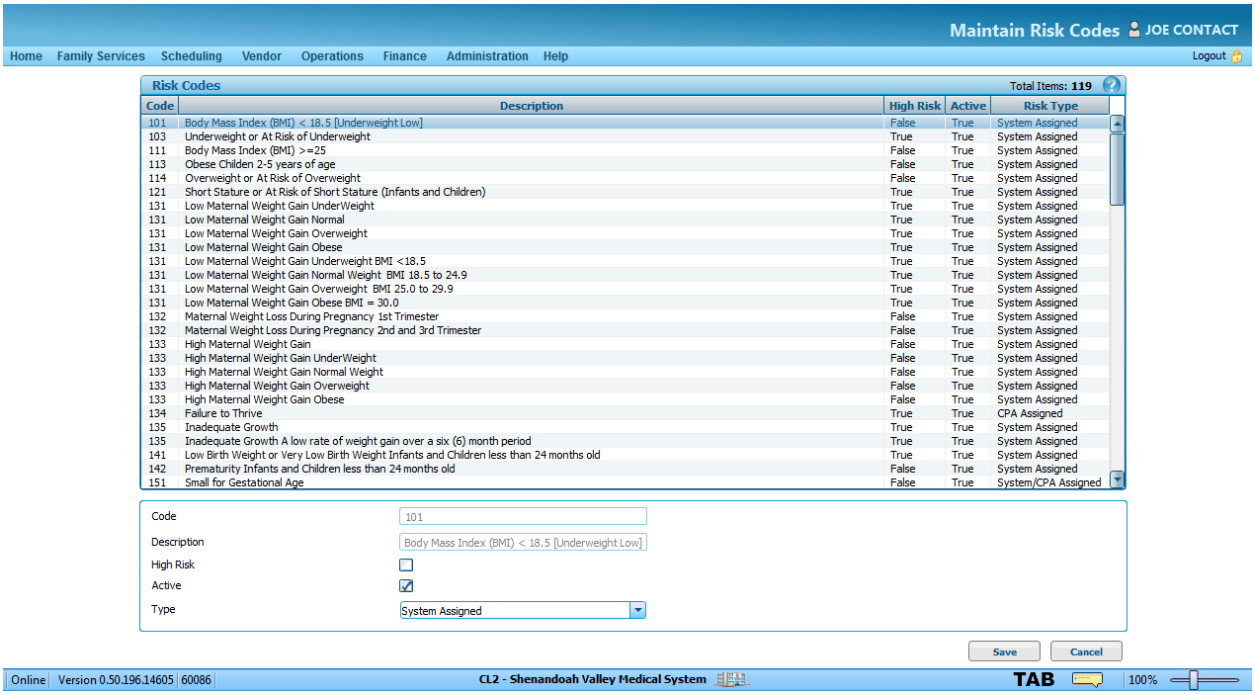
This process includes the following tasks:

Task A. Select the Risk Code to Maintain 15-76
Task B. Enter New Values for the Risk Code 15-77

Task A. Select the Risk Code to Maintain

Complete the following steps to perform this task:

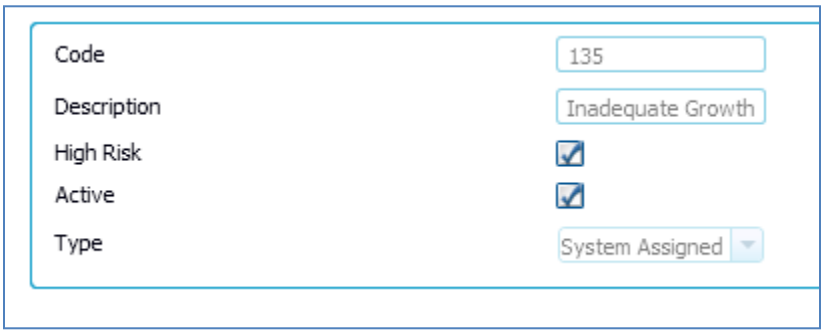
1. From the **Home** screen, go to **Operations → Setup →Maintain Risk Codes**. The **Maintain Risk Codes** screen displays.
2. Select the row of the risk code to maintain.


Maintain Risk Codes
JOE CONTACT
Home
Family Services
Scheduling
Vendor
Operations
Finance
Administration
Help
Logout
Risk Codes
Total Items: 119
Code
Description
High Risk
Active
Risk Type
101 Body Mass Index (BMI) < 18.5 [Underweight Low] False True System Assigned
103 Underweight or At Risk of Underweight True True System Assigned
111 Body Mass Index (BMI) >=25 False True System Assigned
113 Obese Childen 2-5 years of age False True System Assigned
114 Overweight or At Risk of Overweight False True System Assigned
121 Short Stature or At Risk of Short Stature (Infants and Children) True True System Assigned
131 Low Maternal Weight Gain UnderWeight True True System Assigned
131 Low Maternal Weight Gain Normal True True System Assigned
131 Low Maternal Weight Gain Overweight True True System Assigned
131 Low Maternal Weight Gain Obese True True System Assigned
131 Low Maternal Weight Gain Underweight BMI <18.5 True True System Assigned
131 Low Maternal Weight Gain Normal Weight BMI 18.5 to 24.9 True True System Assigned
131 Low Maternal Weight Gain Overweight BMI 25.0 to 29.9 True True System Assigned
131 Low Maternal Weight Gain Obese BMI = 30.0 True True System Assigned
132 Maternal Weight Loss During Pregnancy 1st Trimester False True System Assigned
132 Maternal Weight Loss During Pregnancy 2nd and 3rd Trimester False True System Assigned
133 High Maternal Weight Gain False True System Assigned
133 High Maternal Weight Gain UnderWeight False True System Assigned
133 High Maternal Weight Gain Normal Weight False True System Assigned
133 High Maternal Weight Gain Overweight False True System Assigned
133 High Maternal Weight Gain Obese False True System Assigned
134 Failure to Thrive True True CPA Assigned
135 Inadequate Growth True True System Assigned
135 Inadequate Growth A low rate of weight gain over a six (6) month period True True System Assigned
141 Low Birth Weight or Very Low Birth Weight Infants and Children less than 24 months old True True System Assigned
142 Prematurity Infants and Children less than 24 months old False True System Assigned
151 Small for Gestational Age False True System/CPA Assigned
Code
101
Description
Body Mass Index (BMI) < 18.5 [Underweight Low]
High Risk
Active
Type
System Assigned
Save
Cancel
Online
Version 0.50.196.14605
60086
CL2 - Shenandoah Valley Medical System
TAB
100%

Task B. Enter New Values for the Risk Code

Complete the following steps to perform this task:

1. Make the necessary change to one or more of the following parameters for the risk code:
   - **Code**
   - **Description**
   - **High Risk**
   - **Active**
   - **Type**



Some of the Risk Code parameters are disabled.

The Active indicator is available for all risk codes.

The High Risk and Types fields are available for update on select entries.

The user can not add new risk codes.

2. Click **Save**. A status message indicates the changes to the risk code were successful.

Congratulations!

You have successfully completed the **Maintain Risk Codes** process.

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16- MAINTAIN CLINIC DASHBOARD ROOMS

Maintain Clinic Dashboard Rooms

The **Maintain Clinic Rooms** screen is used to define and maintain clinic service rooms. These rooms are utilized on the **Clinic Family Workflow Dashboard** screen. There, you can see appointments organized by service room (for details, refer to the Viewing Clinic Family Workflow Activity scenario). After rooms have been defined, the **Clinic Room Navigation** screen is used to correlate clinic rooms to navigation links.

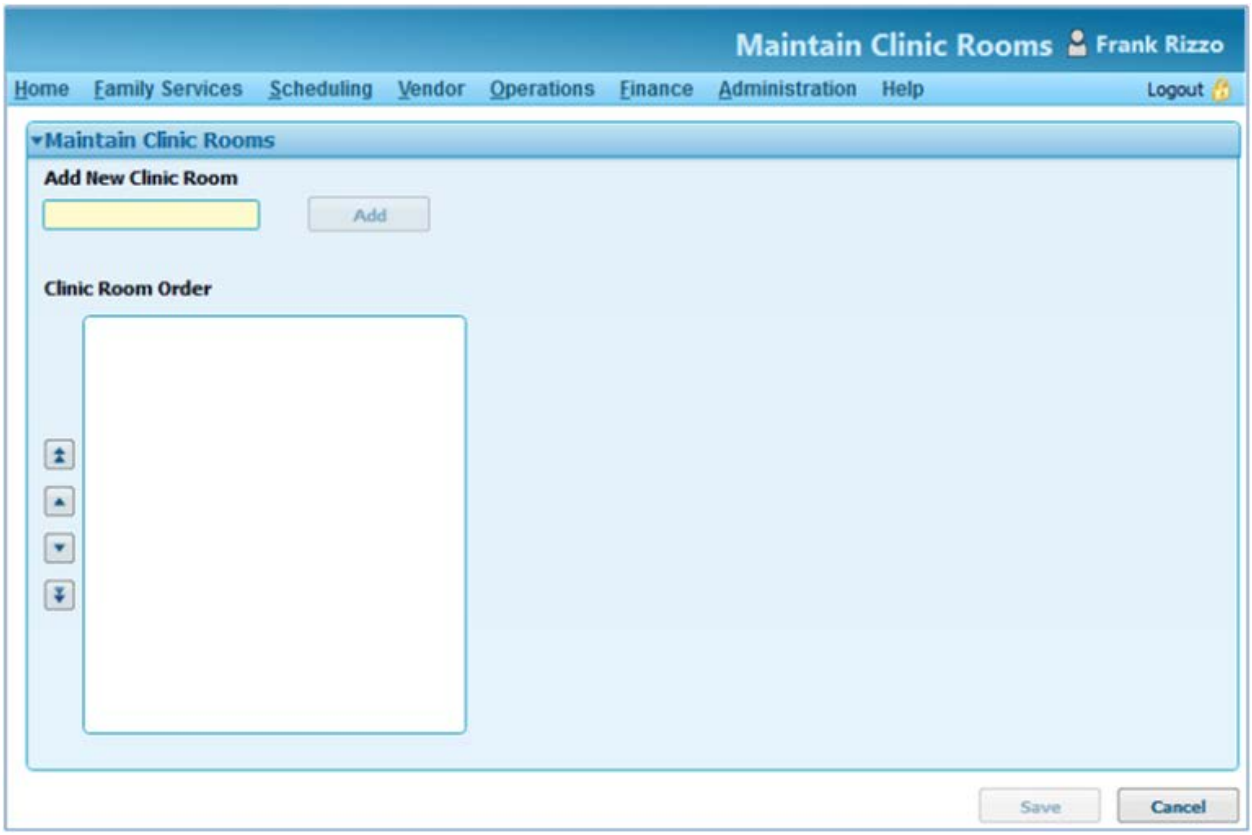
This process includes the following tasks:

Task A. Maintaining Clinic Rooms 16-2

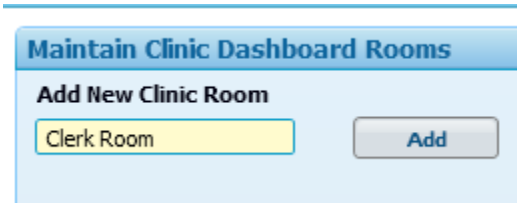
Task A. Maintaining Clinic Rooms

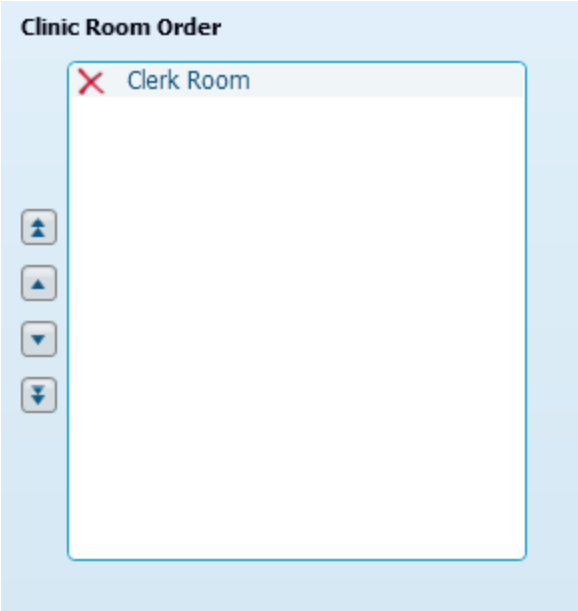
Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → Maintain Clinic Dashboard Rooms**. The **Maintain Clinic Rooms** screen displays.

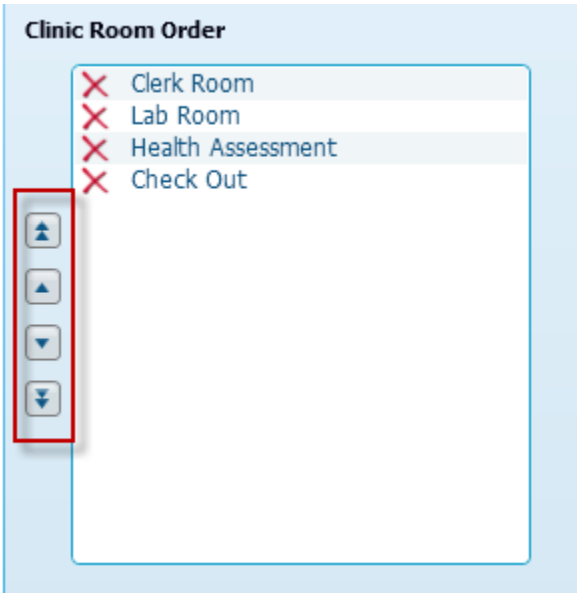


2. Enter a room name under **Add New Clinic Room**.
3. Click **Add**. The new room will be added under **Clinic Room Order**.

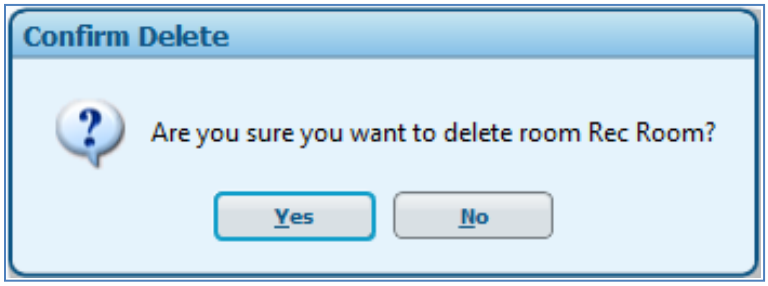




4. After multiple rooms have been added, arrange the display order of the rooms as follows:
    - Click a room name to select it.
    - Click the **Up Arrow** button ( ) to move the room up one position in the list.
    - Click the **Down Arrow** button ( ) to move the room down one position in the list.
    - Click the **Double-Up Arrow** button ( ) to move the room to the top of the list.
    - Click the **Double-Down Arrow** button ( ) to move the room to the bottom of the list.



5. Delete a room from the list as follows:
   - Click the **Delete** button (✕) beside a room name to delete it from the list. The **Confirm Delete** screen displays.



   - Click **Yes**. The room is removed from the list with no further prompting.
6. Click **Save**. A status message displays indicating that the rooms were saved successfully. Additionally, the **Clinic Room Navigation** screen displays. (For details, refer to the Correlating Clinic Rooms to Navigation scenario.)

Congratulations!

You have successfully completed the **Maintain Clinic Dashboard Rooms** process.

17- CORRELATE CLINIC ROOMS TO NAVIGATION

Correlate Clinic Rooms to Navigation

After rooms have been defined, the **Clinic Room Navigation** screen is used to correlate clinic rooms to navigation links.

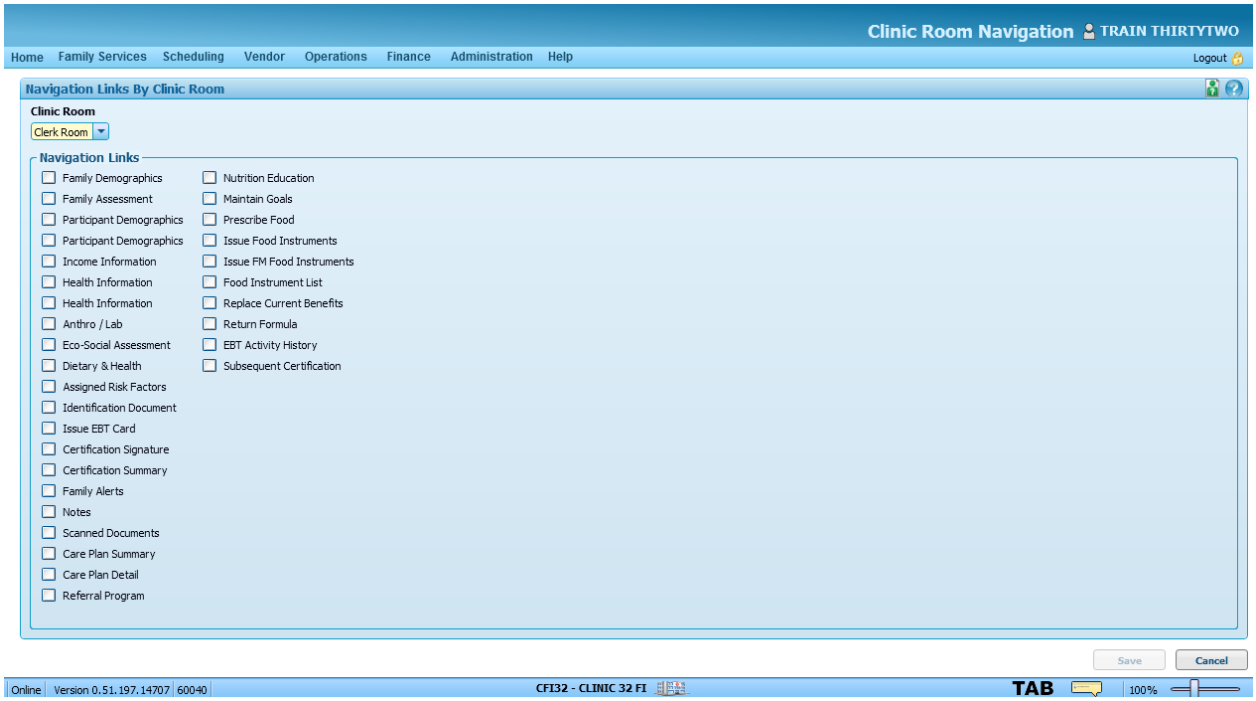
This process includes the following tasks:

Task A. Correlating Clinic Rooms to Navigation 17-2

Task A. Correlating Clinic Rooms to Navigation

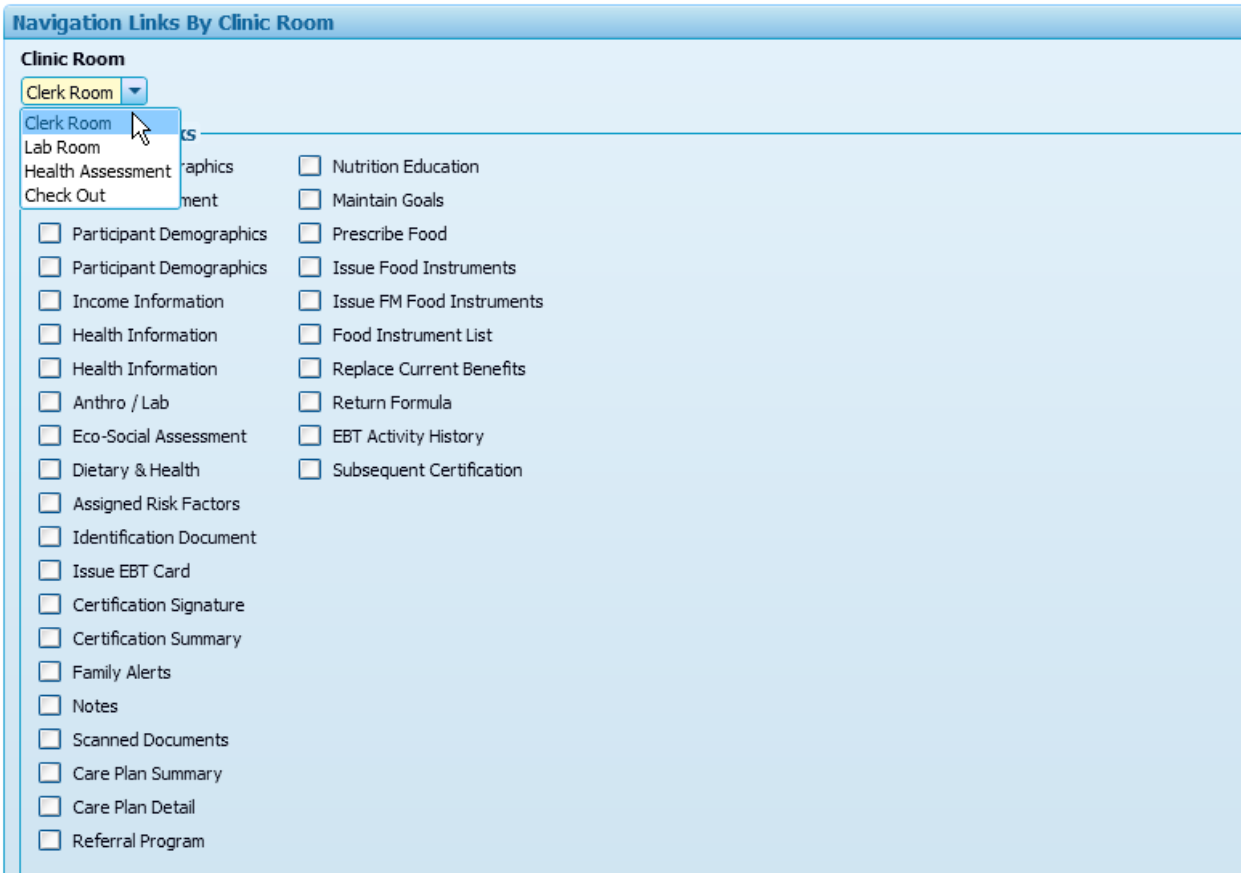
Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → Correlate Clinic Rooms to Navigation**. The **Clinic Room Navigation** screen displays.

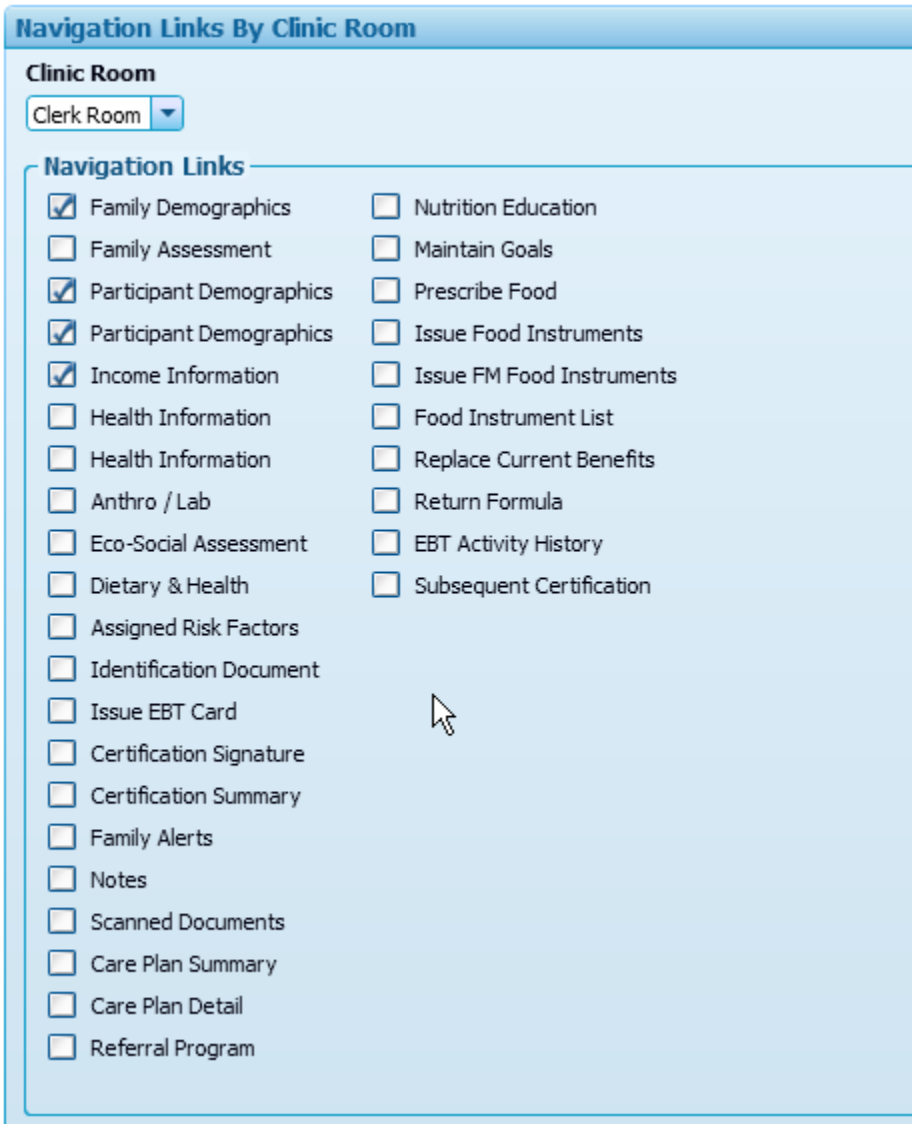


This screen is also accessed from the Maintain Clinic Rooms screen. For details, refer to the Maintaining Clinic Rooms scenario.

2. Select the **Clinic Room**. The **Navigation Links** for the selected room display.



3. Check the boxes under **Navigation Links** as needed. This will correlate the navigation links to the selected room.



Links that have been already correlated to another clinic room will not be available for selection. Each link can only be correlated to a single clinic room.

4. Click **Save**. A status message displays.

Congratulations!

You have successfully completed the **Correlate Clinic Rooms to Navigation** process.

18- CORRELATE APPOINTMENT TYPES TO NAVIGATION

Correlate Appointment Types to Navigation

The **Appointment Type Navigation** screen is used to correlate appointment types to navigation links.

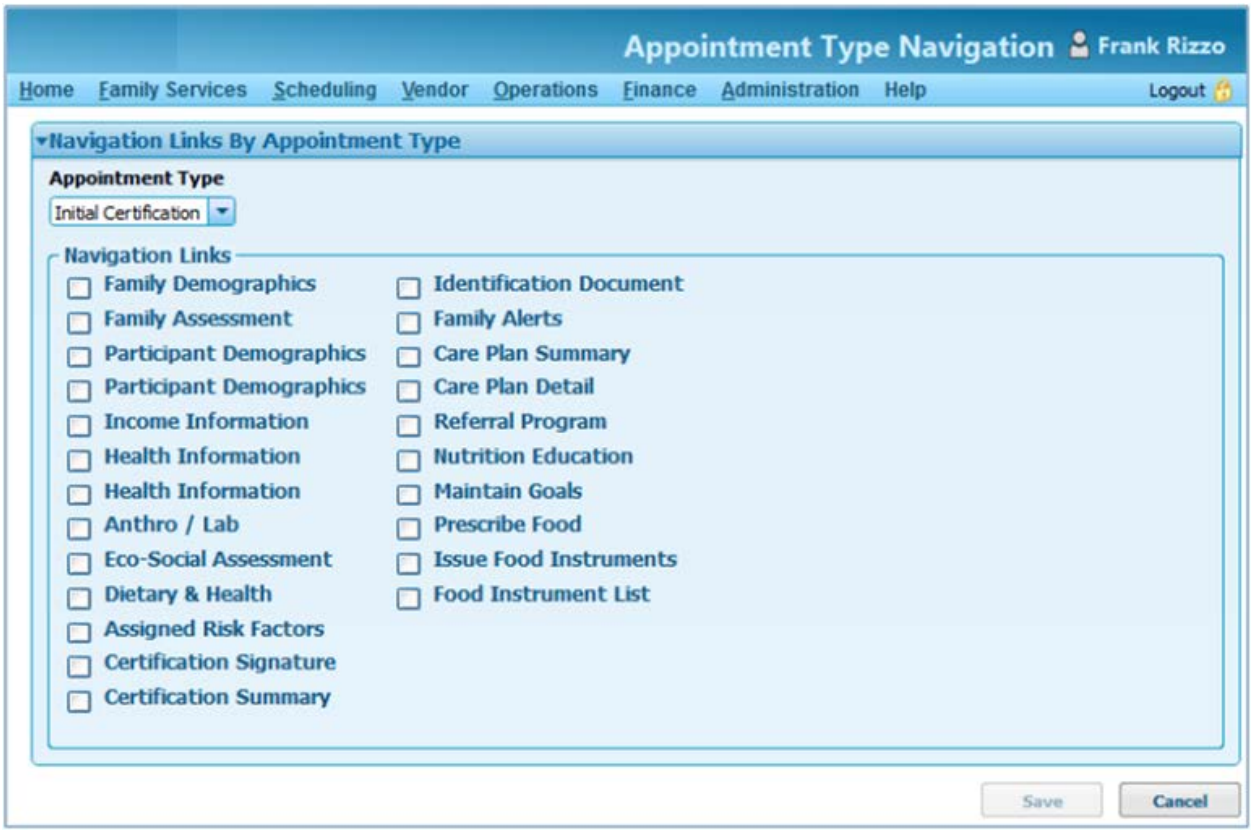
This process includes the following task:

Task A. Correlating Appointment Types to Navigation..... 18-2

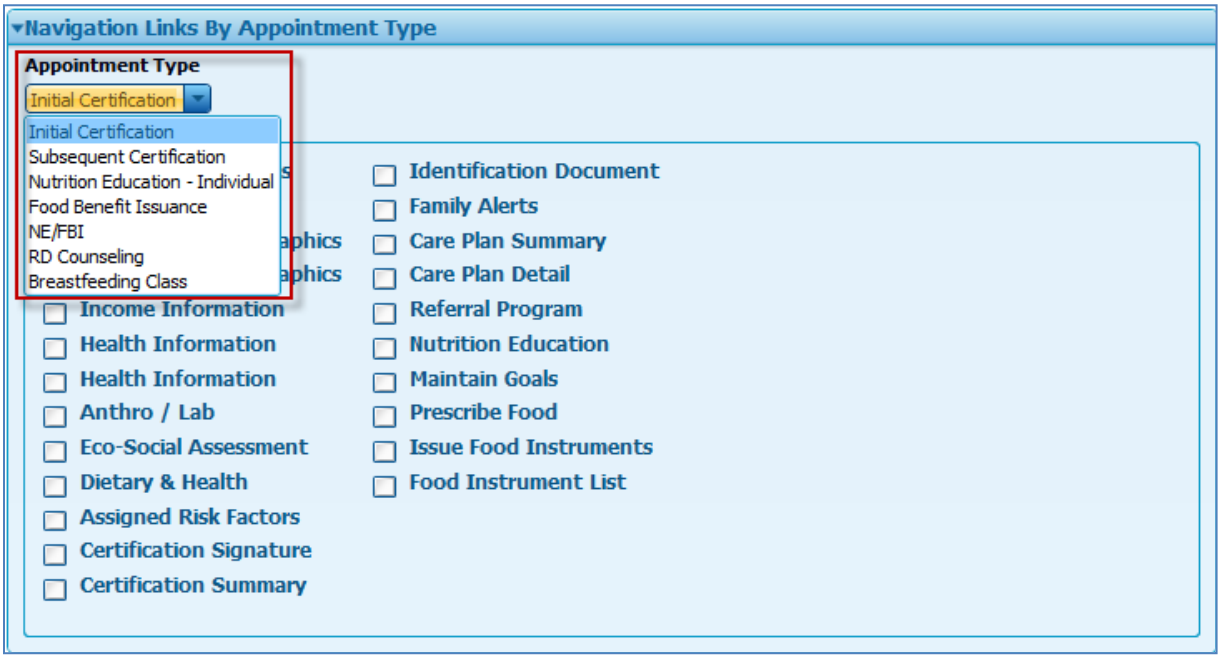
Task A. Correlating Appointment Types to Navigation

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → Correlate Appointment Types to Navigation**. The **Appointment Type Navigation** screen displays.



2. Select the **Appointment Type**. The **Navigation Links** for the selected appointment type display.



3. Check the boxes under **Navigation Links** as needed. This will correlate the navigation links to the selected appointment type.

4. Click **Save**. A status message displays.

Congratulations!

You have successfully completed the **Correlate Appointment Types to Navigation** process.

19- WIC PARTICIPANT AND PROGRAM CHARACTERISTICS STUDY

WIC Participant and Program Characteristics Study

The **WIC Participant and Program Characteristics Study** screen is used to fill out the worksheet for transmitting April data files, as well as to create and send the MDS (minimum data set) and SDS (supplemental data set) files.

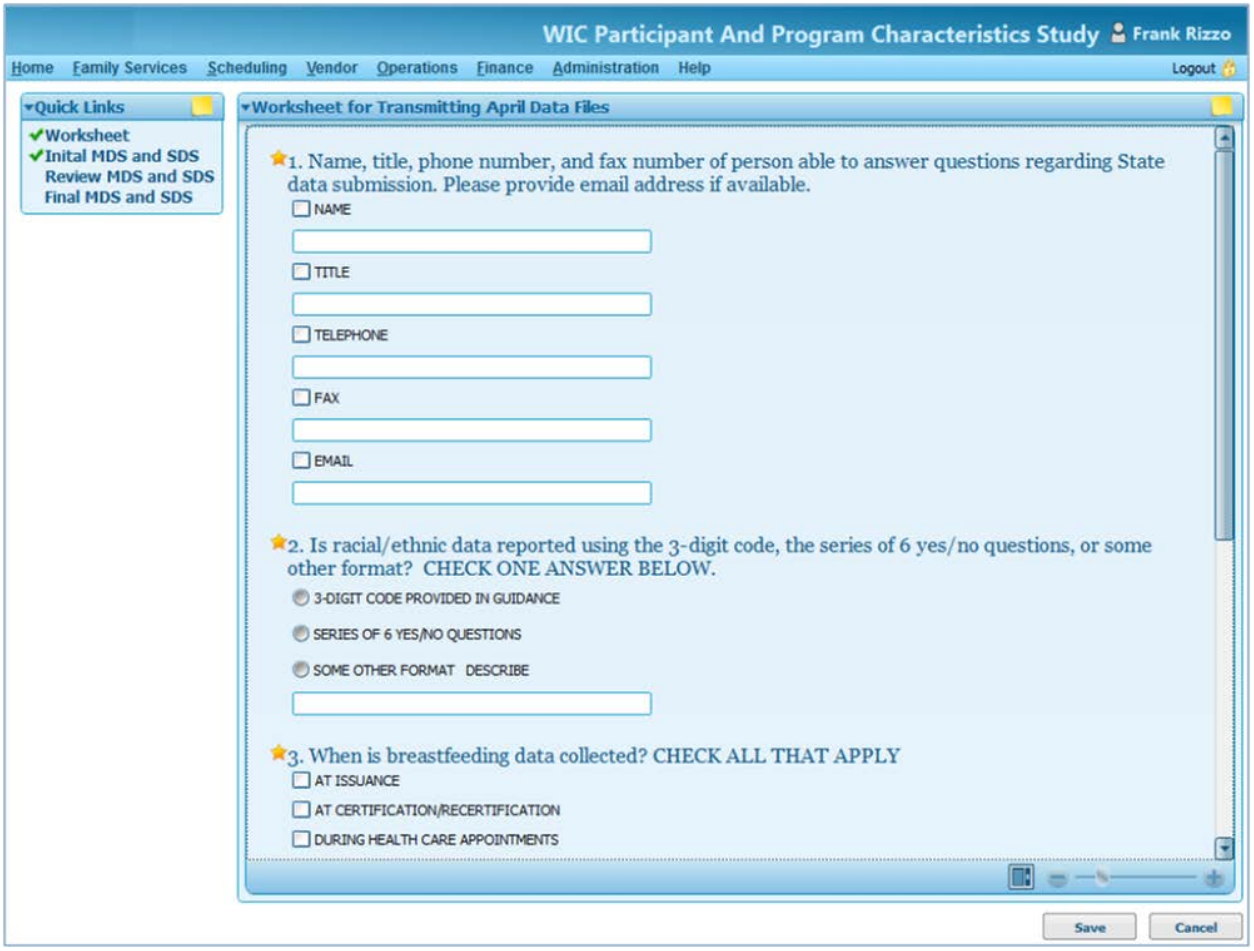
This process includes the following tasks:

Task A. Filling out the Worksheet for Transmitting April Data Files 19-2
Task B. Creating and Sending the Initial MDS and SDS File 19-4
Task C. Creating and Sending the Reviewed MDS and SDS File 19-6
Task D. Creating and Sending the Final MDS and SDS File 19-8

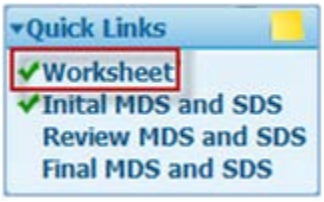
Task A. Filling out the Worksheet for Transmitting April Data Files

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → WIC Participant and Program Characteristics Study**. The **WIC Participant and Program Characteristics Study** screen displays.

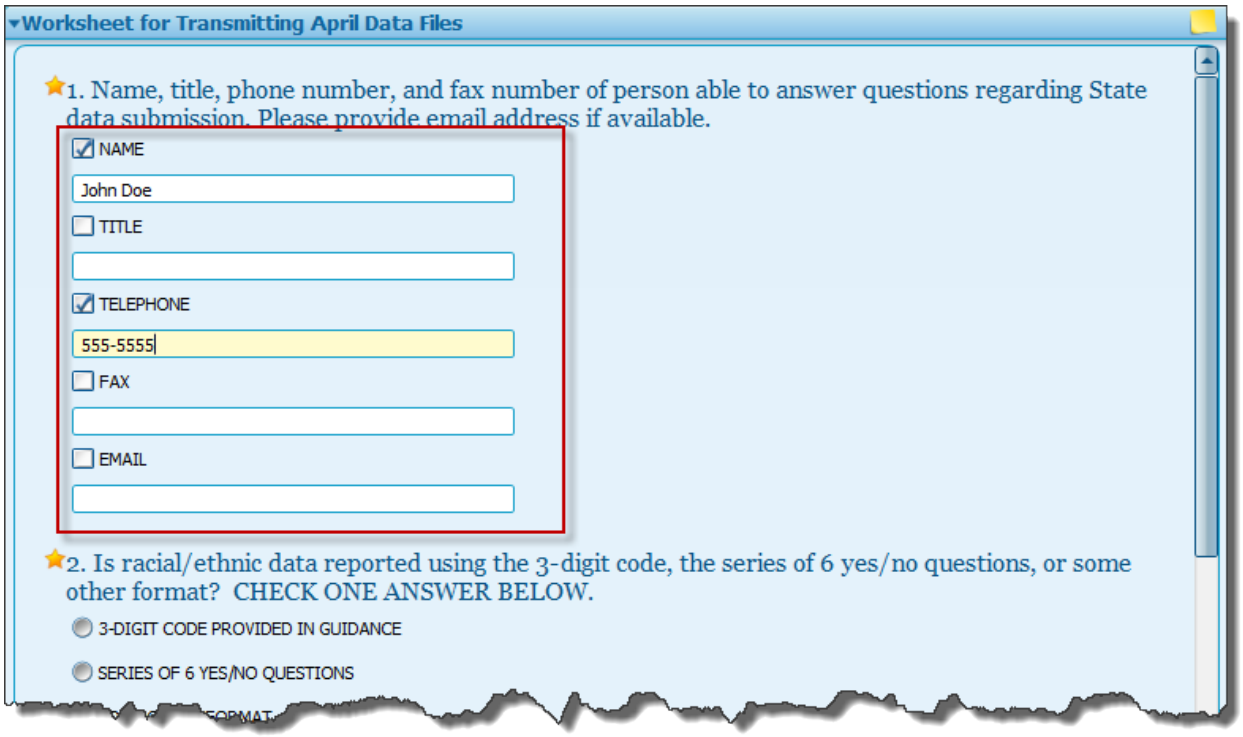


2. Under **Quick Links**, click the **Worksheet** link as needed. The **Worksheet for Transmitting April Data Files** displays.



The Worksheet for Transmitting April Data Files displays by default when the WIC Participant and Program Characteristics Study screen is accessed.

3. Check the boxes to indicate the available contact information for the person who is able to answer questions regarding state data submission. Then enter the **Name**, **Title**, **Telephone**, **Fax**, and **Email**.


Worksheet for Transmitting April Data Files
1. Name, title, phone number, and fax number of person able to answer questions regarding State data submission. Please provide email address if available.
NAME
John Doe
TITLE
TELEPHONE
555-5555
FAX
EMAIL
2. Is racial/ethnic data reported using the 3-digit code, the series of 6 yes/no questions, or some other format? CHECK ONE ANSWER BELOW.
3-DIGIT CODE PROVIDED IN GUIDANCE
SERIES OF 6 YES/NO QUESTIONS

4. Click one of the available answers to indicate how racial/ethnic data is reported: **3-Digit Code Provided in Guidance**, **Series of 6 Yes/No Questions**, or **Some Other Format**.

If Some Other Format is indicated, include a description.

5. Check all applicable boxes to indicate when breastfeeding data is collected: **At Issuance**, **At Certification/Recertification**, **During Health Care Appointments**, **At Nutrition Education Sessions**, **Separate Telephone or Mail Inquiry**, or **Other**.

If Other is indicated, include a description.

6. Click one of the available answers to indicate how your state collects breastfeeding data: **Only on Infants Ages 6 to 13 Months in April**, **On Infants Aged 6 to 13 Months when Data are Collected**, **All Infants**, or **Other**.

If Other is indicated, include a description.

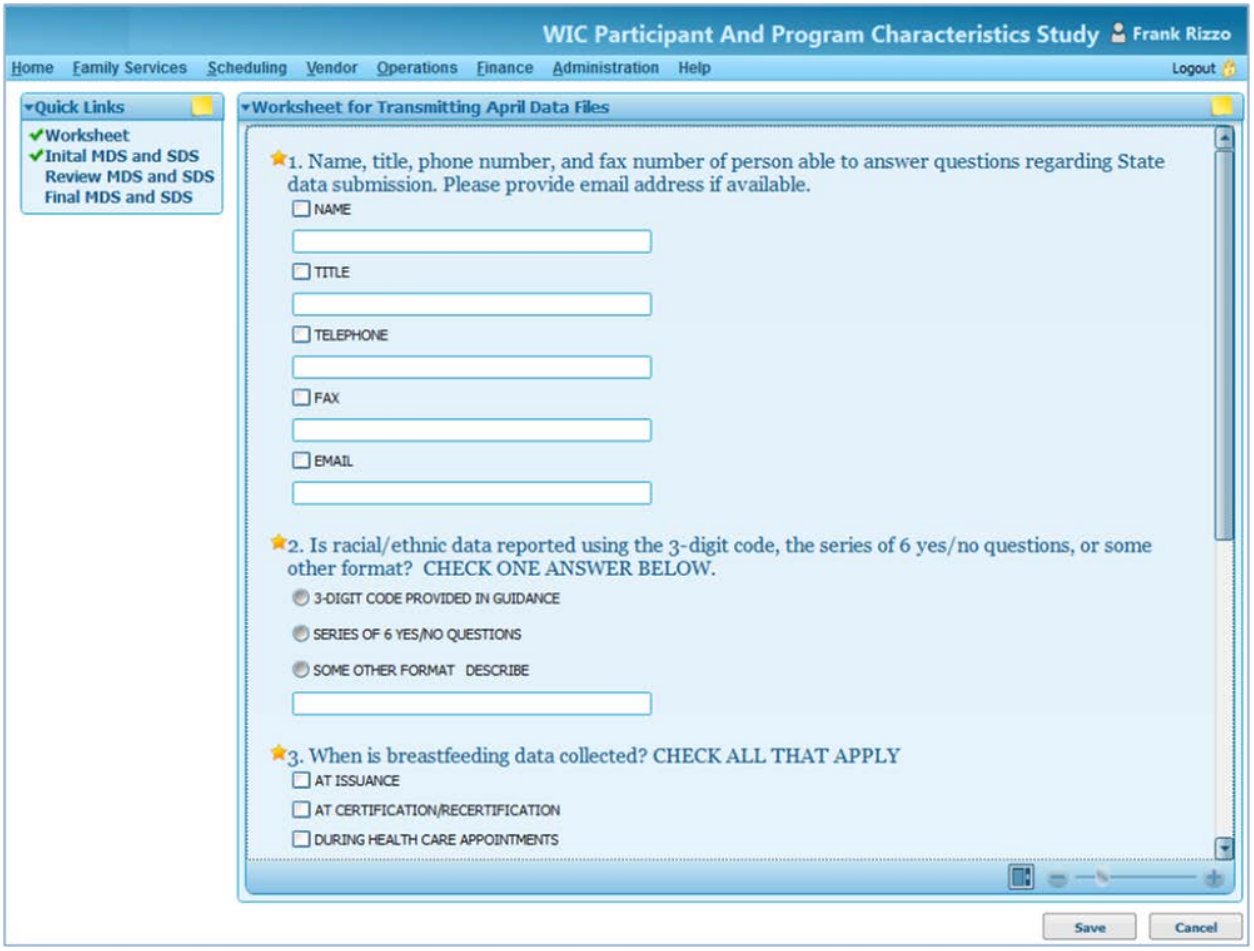
7. Click one of the available answers to indicate if breastfeeding data is collected routinely or only for biennial PC reporting: **Routinely** or **Only for PC Reporting**.

8. Click **Save**. A status message displays.

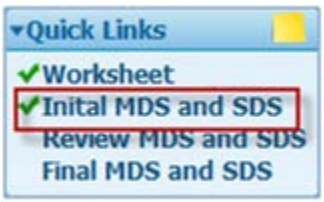
Task B. Creating and Sending the Initial MDS and SDS File

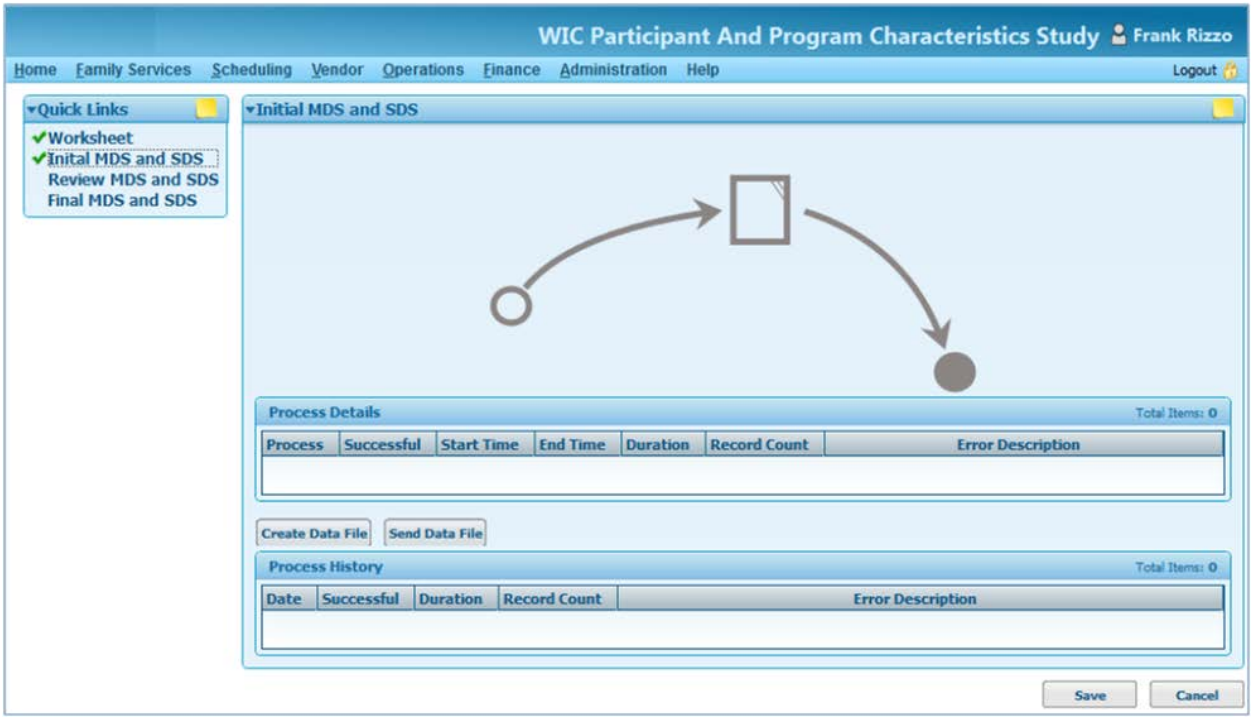
Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → WIC Participant and Program Characteristics Study**. The **WIC Participant and Program Characteristics Study** screen displays.



2. Under **Quick Links**, click the **Initial MDS and SDS** link. The **Initial MDS and SDS** screen displays.



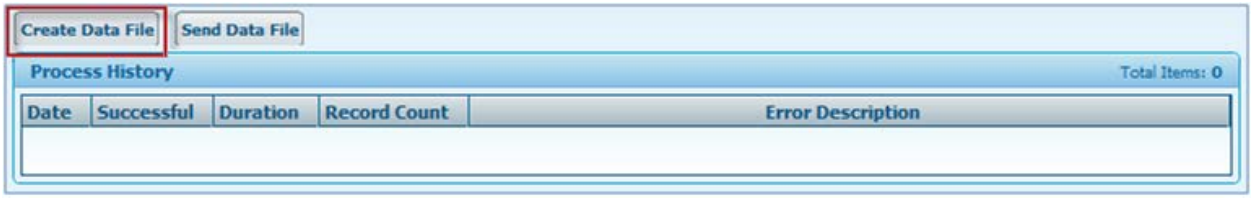


A visual representation of the process flow displays under Initial MDS and SDS.

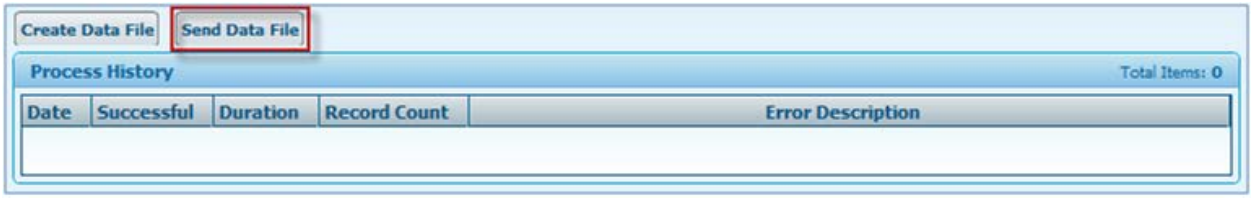
The Process Details grid displays the name of each process, whether the run was successful, the start and end times, duration, record count, and error description.

The Process History grid displays the date of each process, whether the run was successful, the duration, record count, and error description.

3. Click **Create Data File** to create the initial MDS (minimum data set) and SDS (supplemental data set) file.



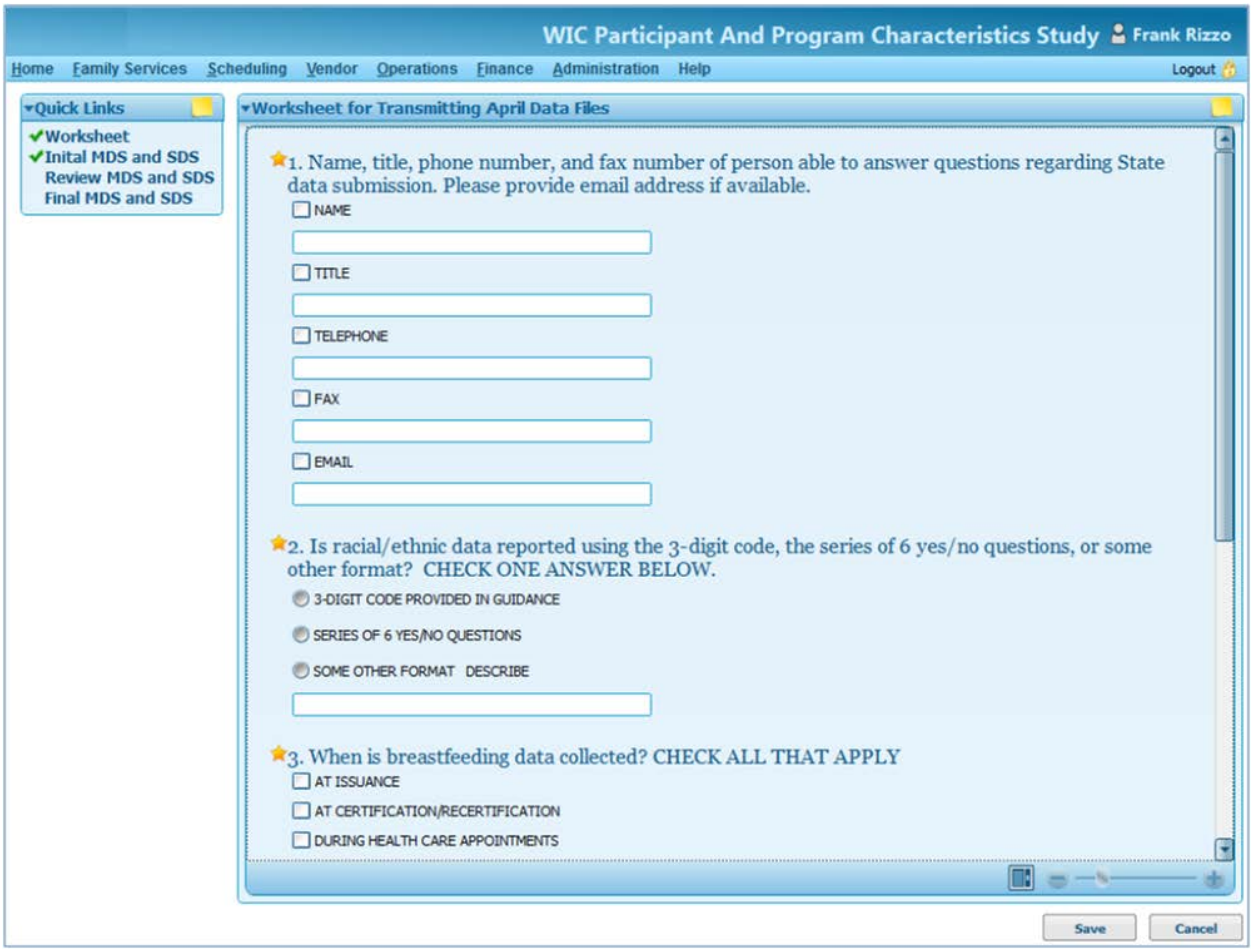
4. Click **Send Data File** to send the previously created file.



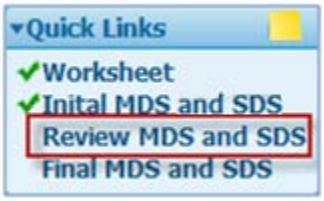
Task C. Creating and Sending the Reviewed MDS and SDS File

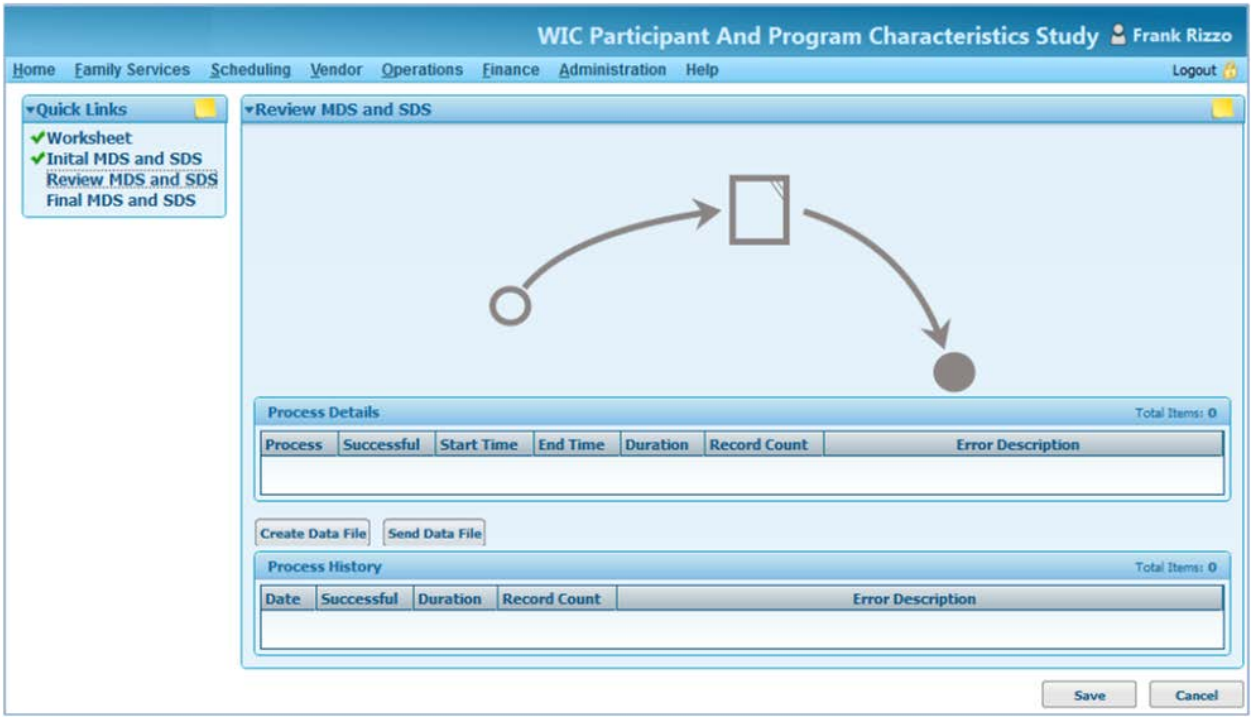
Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → WIC Participant and Program Characteristics Study**. The **WIC Participant and Program Characteristics Study** screen displays.



2. Under **Quick Links**, click the **Review MDS and SDS** link. The **Review MDS and SDS** screen displays.



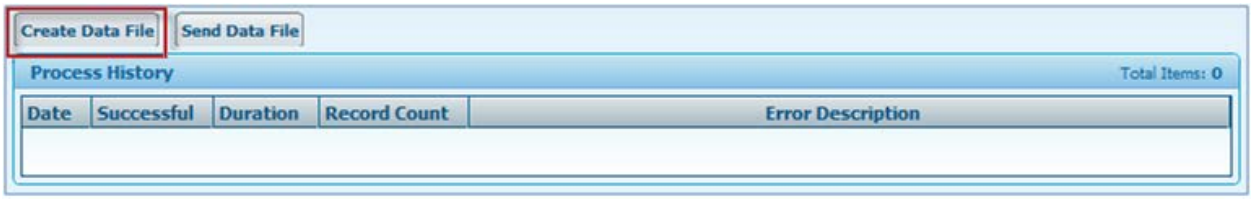


A visual representation of the process flow displays under Review MDS and SDS.

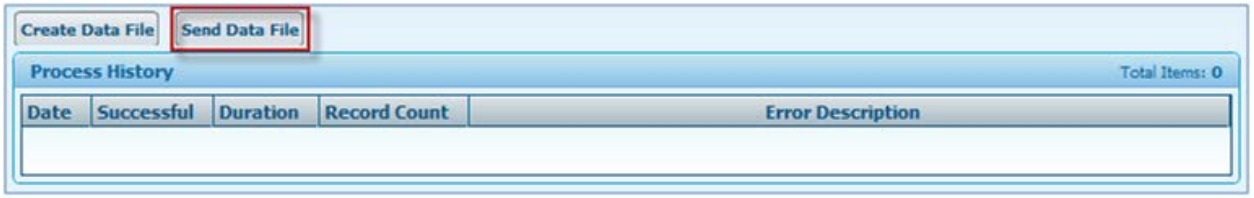
The Process Details grid displays the name of each process, whether the run was successful, the start and end times, duration, record count, and error description.

The Process History grid displays the date of each process, whether the run was successful, the duration, record count, and error description.

3. Click **Create Data File** to create the reviewed MDS (minimum data set) and SDS (supplemental data set) file.



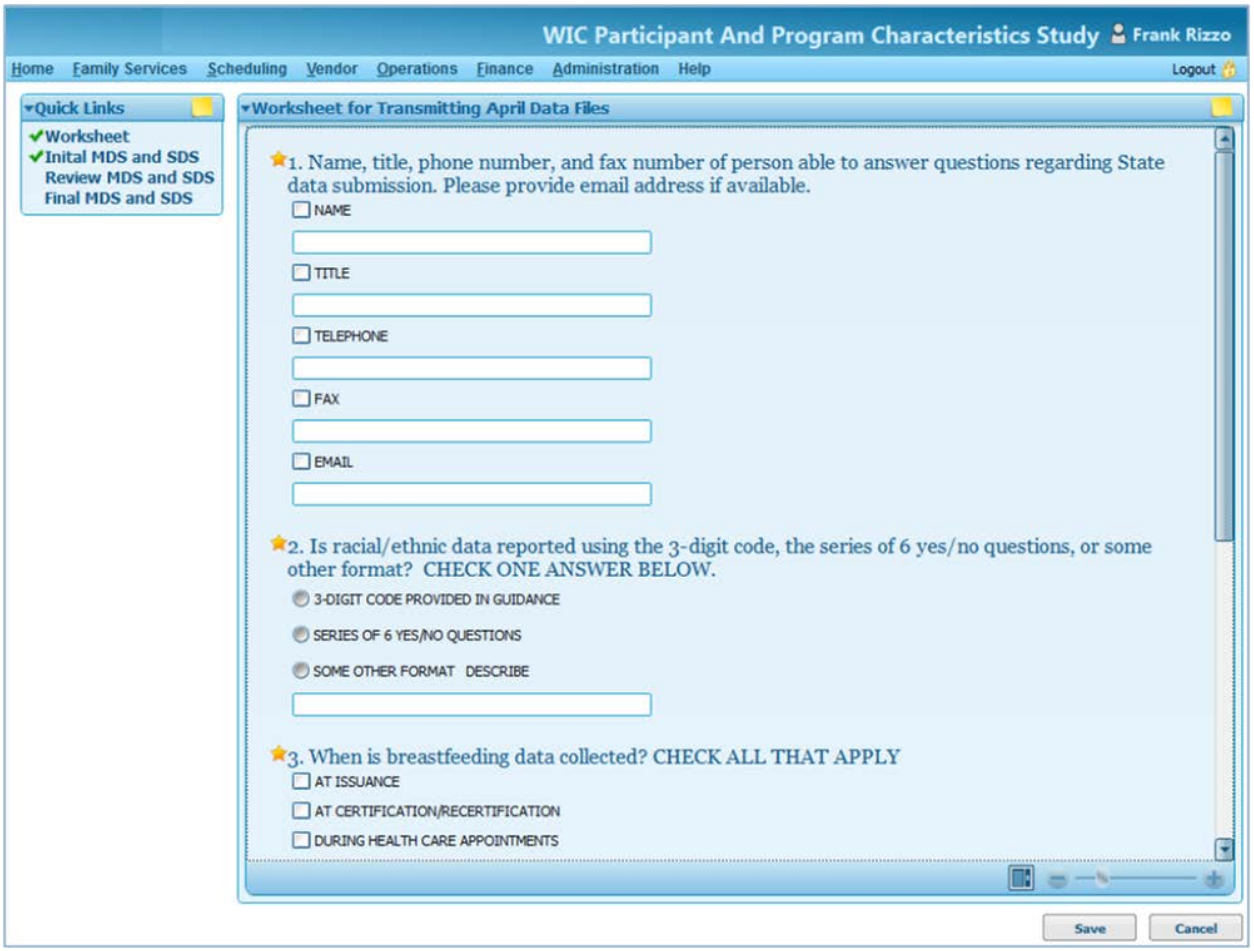
4. Click **Send Data File** to send the previously created file.



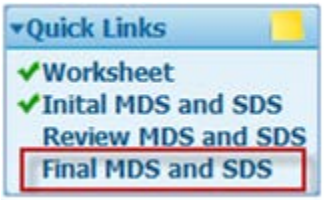
Task D. Creating and Sending the Final MDS and SDS File

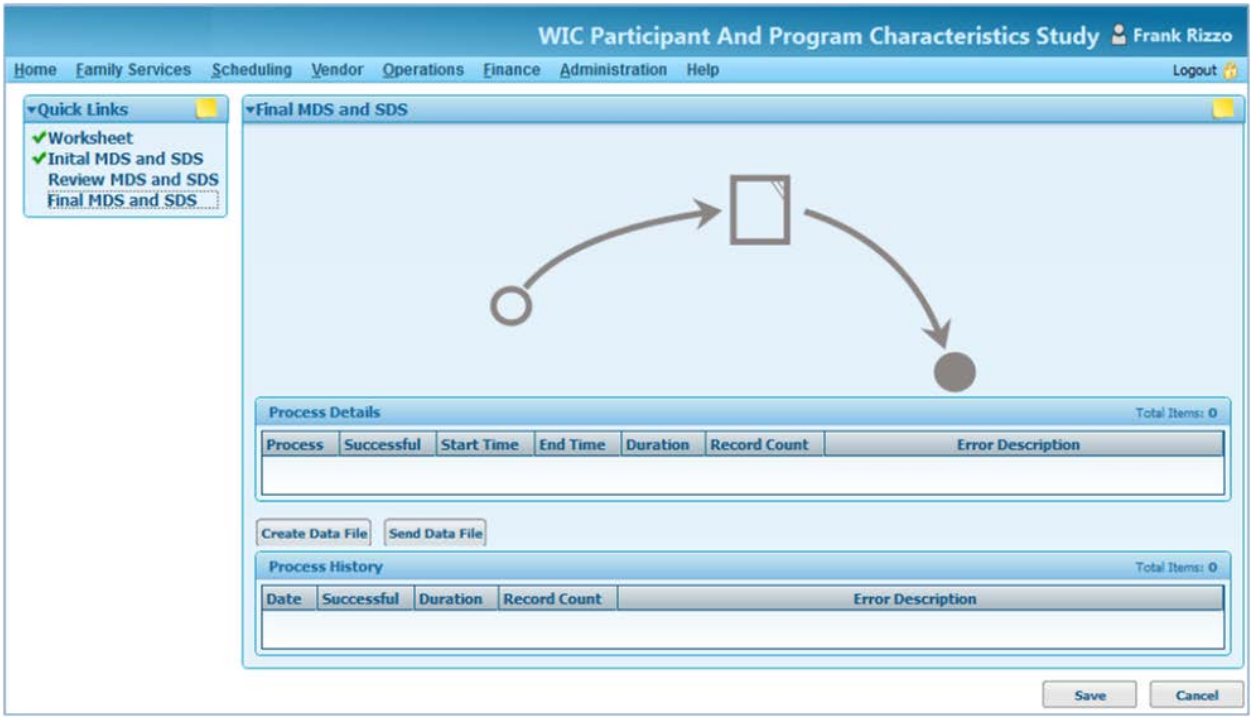
Complete the following steps to perform this task:

1. From the **Home** screen, go to **Operations → WIC Participant and Program Characteristics Study**. The **WIC Participant and Program Characteristics Study** screen displays.



2. Under **Quick Links**, click the **Final MDS and SDS** link. The **Final MDS and SDS** screen displays.



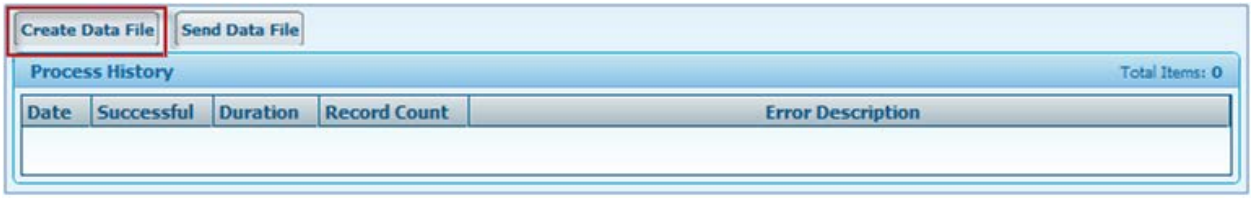


A visual representation of the process flow displays under Final MDS and SDS.

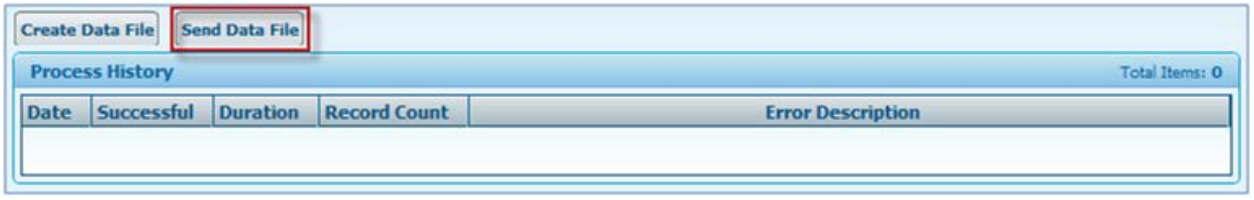
The Process Details grid displays the name of each process, whether the run was successful, the start and end times, duration, record count, and error description.

The Process History grid displays the date of each process, whether the run was successful, the duration, record count, and error description.

3. Click **Create Data File** to create the final MDS (minimum data set) and SDS (supplemental data set) file.



4. Click **Send Data File** to send the previously created file.



Congratulations!

You have successfully completed the **WIC Participant and Program Characteristics Study** process.